IN THE UNITED STATES PATENT AND TRADEMARK OFFICE

In Re the Application of:)	Group Art Unit: 3473
)	
KIEFHABER, et al.)	TC/A.U. 2609
)	
Serial No.: 10/815,534)	Examiner: NGUYEN, K.
)	
Filed: March 31, 2004)	DECLARATION OF HENRY R. PADDOCK
)	UNDER 37 C.F.R. §1.131
Atty. File No.: 4366-140)	
)	
For: "CONTACT CENTER AND METHOD)	
FOR TRACKING AND ACTING ON)	
ONE AND DONE CUSTOMER)	
CONTACTS" (Amended)	

Commissioner for Patents
P.O. Box 1450
Alexandria, Virginia 22313-1450

Dear Sir:

I, Henry R. Paddock, declare as follows:

1.   I am currently employed by Avaya, Inc., which has an interest in the above application, and an inventor of the above-referenced application. I receive an inventor award in connection with the above application. This Declaration is being submitted in connection with prosecution activities for the above-referenced patent application.

2.   An interview regarding the subject matter of the above-referenced application was held among Rodney Thompson and myself on the one hand and David Volejnicek, corporate counsel, in March, 2003.

3.   Patent Submission 403037, attached hereto as Exhibit "A" and entitled "Tracking and Acting on One and Done" was prepared and thereafter received for consideration by the Intellectual Property Law department of Avaya. The IP Law department approved the submission for filing as a US patent application and forwarded the Patent Submission to outside counsel.

4.   Upon information and belief, the Patent Submission was forwarded to outside counsel on June 24, 2003, and received by outside counsel on June 26, 2003. On June 30, 2003, Douglas Swartz, the outside counsel, contacted myself and the other inventors regarding scheduling an in-person interview to discuss the Patent Submission. Emails were exchanged among the various parties on June 30 and July 1,

3, and 8, 2003, attempting to scheduling the interview. Rodney Thompson was out of the office until July 10, 2003.

5.   The interview was held in Westminster, Colorado, on or about July 8, 2003. An annotated partial transcript of this interview is attached hereto as Exhibit "B". Also attached to Exhibit "B" are drawings generated during the meeting. At the meeting, we discussed three separate inventions, each of which was to be the subject of a separate patent application.

6.   A draft patent application was forwarded to us for review on or about January 5, 2004. Mr. Swartz sent a reminder to us to review the application on February 11, 2004. Two other draft applications directed to the other inventions were forwarded to us around the same time.

7.   Upon information and belief, we reviewed the application in mid-February and provided our comments to Mr. Swartz by email on or about February 24, 2004.

8.   Mr. Swartz revised the draft application and forwarded it to us for further review on March 8, 2004.

9.   Mr. Swartz subsequently sent an email to us on March 15, 2004, requesting our further review of the application as the application needed to be filed by the end of March.

10.   Katherine Sobus send an email to Mr. Swartz on March 16, 2004, requesting a copy of any document that needed to be signed before her departure on a trip to South America the following week. She was to return from the trip on March 29, 2004.

11.   Emails were exchanged between outside counsel and Ms. Sobus on March 25, 2004, regarding execution of documents.

12.   A final draft of the application was forwarded to us on March 25, 2004.

13.   After reviewing the draft application, I and the other inventors signed the Declaration and Power of Attorney and Assignment and returned them to Mr. Swartz.

14.   The above-referenced application was subsequently filed on March 31, 2004.

15.   With reference to independent claims 1, 13, and 27, Exhibits "A" and "B" collectively describe identifying contacts that are not "one and done" and taking appropriate actions for these contacts, such as sending the contacts to an appropriate destination or recording the contact interaction. A non-"one and done" situation can be derived based on the duration between current and last contacts from a common customer, the contact center customer entering an existing trouble ticket id or specifying that the most recent contact is in regards to a previous contact, a contact center agent entering information that relates the current contact to one or more previous contacts, receiving an email from a contact center customer that contains the existing trouble ticket number, content analysis, post-contact survey results from previous contact, etc. Once a contact is determined not to be a "one and done" situation, the contact

center can take action to minimize the number of contacts (x and done), such as route to a better skilled agent or supervisor, activate quality monitoring (contact recording), start service observing, alert a business manager or executive, and the like.

16.   With reference to independent claim 1, Exhibit "B" describes tracking, over a selected time period and for a set of agents servicing discrete real-time and non-real-time contacts, a number of discrete real-time and non-real-time contacts serviced by the set of agents that are and/or are not related to one or more other discrete real-time and non-real-time contacts serviced by the plurality of agents. Exhibit "B" further describes maintaining, for the set of agents, an indicator indicating at least one of (i) a number of discrete real-time and non-real-time contacts, serviced by the set of agents during the selected time period, that are not related to one or more other discrete real-time and non-real-time contacts serviced by one or more of the plurality of agents and (ii) a number of discrete real-time and non-real-time contacts, serviced by the set of agents during the selected time period, that are related to one or more other discrete real-time and non-real-time contacts serviced by the plurality of agents.

17.   With reference to independent claim 13, Exhibit "B" describes receiving a first real-time contact from or initiating a second real-time contact with a first customer, determining whether the first and/or second contact is related to another real-time or non-real-time contact with the first customer, and, when the first and/or second contact is related to another real-time or non-real-time contact with the first customer, servicing the first and/or second contact differently than when the first and/or second contact is unrelated to another real-time or non-real-time contact with the first customer.

18.   With reference to independent claim 27, Exhibit "B" describes a contact center for servicing contacts having an input operable to receive a contact from a first customer and a selector operable (i) to determine whether the received real-time contact is related to another real-time or non-real-time contact with the first customer and (ii) when the received real-time contact is related to at least one real-time and non-real-time contact with the first customer, to service the received real-time contact differently than when the received real-time contact is unrelated to at least one real-time and non-real-time contact with the first customer.

19.   The foregoing statements and attached exhibits establish a conception date before the July 22, 2003, filing date of U.S. Patent Application Publication 2005/0021529 to Hodson, et al., and the August 20, 2003, filing date of U.S. Patent Application Publication 2005/0043986 to McConnell,

et al., and diligence between the conception date and the constructive reduction-to-practice date, or the filing date of the above-captioned application.

20.   I hereby declare that all statements made herein of my own knowledge are true and that all statements made on information and belief are believed to be true; and further, that the statements were made with the knowledge that willful false statements and the like, so made, are punishable by fine or imprisonment, or both, under Section 1001 of Title 18 of the United States Code, and that such willful false statements may jeopardize the validity of the subject application or any patent issuing thereon.

Date: 11/7/07   By: _____
                            Henry R. Paddock

-4-

EXHIBIT A
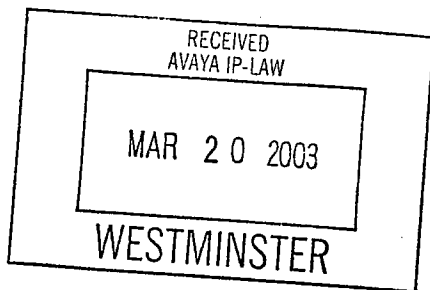
03-37

AVAYA

subject: **Patent Submission – Tracking and Acting on One and Done**

date: March 20, 2003

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PLEASE TRY TO LIMIT YOUR SUBMISSION TO 2 PAGES (MAXIMUM - 3).

IF YOU HAVE ANY QUESTIONS REGARDING THIS SUBMISSION FORM, PLEASE CONTACT DAVID VOLEJNICEK, +01-303-538-4154 or TINA WILSON, +01-303-538-4600.

TO: Avaya West Patent Committee – Room 2U41, 1300 W 120th Avenue, Denver, CO 80234-2701, trwilson@avaya.com

Problem:
What overall problem(s) does the idea solve?

For many contact centers, a key measure should be "one and done." Whether the center is sales or services, when a customer contacts the center multiple times to accomplish one transaction, the cost of service rises, which lowers the overall profitability. The problem is that it is not easy to compute "one and done" and therefore agents and contact

AVAYA INC. - PROPRIETARY
Use pursuant to Company Instructions.

centers today are not measured against it. Another consideration of one and done is whether the contact had to be served by multiple servers (e.g., agents) - even in a single interaction.

Prior Art:
How have others -- either within Avaya or outside -- addressed the problem, if you know? What is the present commercial practice? In what way(s) do the presently known solutions fall short of fully solving the problem(s)?

Existing art allows for the tracking of "trouble" tickets (e.g., WebQ/QQ business application). These trouble ticket applications can retrieve open and closed trouble tickets and display them to agents. It may even be possible, through integration, to push the most recent trouble tickets to an agent upon delivering a contact. We are not aware, however, of existing art that allows for the identification of a situation that is not "one and done," and then make contact-handling decisions based upon this identification.

Brief Description:
What is your solution to the problem(s)? Supply block diagrams, sketches, high-level flowcharts, etc., as attachments, along with a written description which explains how the invention works and how it relates to its environment.

This proposed concept enables a contact center to identify contacts that are not "one and done" (either through automatic or manual methods) and for a contact center to take appropriate action for these contacts, such as sending these contacts to an appropriate destination or recording the contact interaction. A non-"one and done" situation can be derived based on duration between current and last contact (defined by the contact center), contact center customer entering an existing trouble ticket id or specifying that the most recent contact is in regards to a previous contact, contact center agent entering information that relates the current contact to one or more previous contacts, receiving email from a contact center customer that contains the existing trouble ticket number, content analysis, post-contact survey results from previous contact, etc. Once a contact is determined not to be a "one and done" situation then the contact center takes action to minimize the number of contacts (x and done), such as route to a better skilled agent or supervisor, activate quality monitoring (contact recording), start service observing, alert a business manager or executive, etc.

Comparison:
What are the basic differences between your solution and those known in the prior art? What commercial benefits or advantages arise from those differences (such as reduced product cost, new or enhanced product feature, greater reliability of operation)?

The new art takes action, such as escalation, on contacts that are identified to have previously related contacts (not "one and done"). The action should be intended to minimize the number of contacts required to address a customer request/issue.

Novelty:
State in one sentence the gist of what distinguishes your idea from the prior art.

This idea enables a contact center to measure itself against its "one and done" objective and to take appropriate action, on a contact level, when the goal is not met.

Use of the Idea:
Standards: Is the idea of a type which gets incorporated into industry standards? Are there present plans to include the idea in an Avaya submission to a standards body?

Avaya use: What existing or planned Avaya products incorporate the idea? If none, what is your opinion as to the likelihood of Avaya use and the time frame? What is the basis for your opinions?

Others' use: Answer same questions vis-à-vis other companies.

Standard: Not Applicable

Avaya Use: This solution can be accomplished through the integration of Interaction Center, Operational Analyst, Avaya and/or 3rd party applications (e.g., Siebel). Interaction Center can collect data from content analysis, Avaya IR, 3rd party applications (e.g., Siebel), etc., and make handling decisions (e.g., identify destination, activate contact recording, service observing, etc.) based on the identification of a situation that is not a "one and done" situation. Interaction Center records contacts that were not "one and done" for Operational Analyst reporting purposes. This

enables the contact center to monitor the success of the "one and done" objective. Avaya IR, for example, can be scripted to collect information that identifies situations that are not "one and done," which allows IC to take the appropriate action.

Others' Use: Like Avaya, other companies can define their work flows, or routing engines, to identify situations that are not "one and done" and to take the appropriate action when this situation is encountered. The best means of detecting these situations is likely to require the integration of routing decisions and 3rd party applications (e.g., Siebel trouble ticket application), IVR systems, etc.

Detection of Use:
How would others' use of the invention be detected by Avaya? For example, would it be visible from the product or service offering itself? Described in a product brochure or user/repair manual?

If none of the above, would reverse-engineering to discover use be complex/expensive? straightforward/inexpensive?

The use of this invention should be fairly easy to detect. The feature may be advertised in marketing collateral. The ability to support this functionality may appear in white papers. The contact center itself would have to establish a mechanism to collect the data to be able to identify situations that are not "one and done." These mechanisms would likely be apparent to contact center customers (e.g., IVR request for related trouble ticket number, etc.). The contact center would then have to treat the contact appropriately based on this knowledge. The action may be more difficult to detect since it may not be noticeable to the contact center customer (e.g., delivery to a supervisor, activation of contact recording, activation of service observing, etc.).

Economic Impact:
What is the annual sales volume or revenue across the industry for products/services that this idea applies to?

"One and done" is a desirable objective for many contact centers. The affected industry is the multi-media contact center industry. The addressable Multi-Media Contact Center market is estimated to be $1.6 billion in 2003.

Originators:
List name, business group and organization/team name or acronym, department, room number, extension, email.

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Rating:
Based on the Avaya Patent Filing Policy chart (attached), what is the Rating for this idea?
Your Rating ? _____II_____
Your Director's Rating ? ___II_____
Your Director's Name? _Susan Murtishaw_____

Attorney:
List any attorney with whom the idea has already been discussed.

David Volejnicek

Attachments:

Identify them.

None

Randy Paddock
Rodney Thompson   3/14/03

"One & done"

how does contact c/r ensure that 1 contact
is enough.

when you detect something to _not_ "overdone"
what can you do to notify call c/r
thereof

how would you detect "not one & done"
    matching ticket #
    analysis of what caller puts into IVR
  * looking @ what agent is pulling up on
                screen
  * also tie in multimedia contacts,
      e.g. by "subject" line

once you ID not over done,
    call c/r handles the contact _differently_
    to ensure resolution

also report
just an idea - no development
not aware of any P.A.

One and done

Problem: For many contact centers a key measure should be "one and done". Whether the center is sales or services, when a customer contacts the center for a previous interaction, the costs go up which lowers the overall profitability. The problem it is not easy to compute "one and done" and therefore agents and centers today are not measured against it. Another consideration of one and done is whether the contact had to be served by multiple servers - even in a single interaction.

Identifying: Ways to determine one and done: agent indication, customer indication, content analysis, re-contact within a certain time frame. In all cases I don't know when I finish a new interaction if that particular interaction will be one and done.

Reporting: One thought is rather than focus on whether today's contacts will be one and done, is to focus on how many of today's contacts were related to previous interactions or required multiple servers. We would need to track this against the previous agent. For example, there were 12 interactions today that agent x had not closed on the contact's last interacton.

Acting: When I determine this is a subsequent related interaction, I can take a number of actions. I can turn on a recording or start a service observing, I can pick an agent who is better at closure, I can alert a manager.

EXHIBIT B

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INV

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INV:/ ..?.. Kathy....

Kay, hey, where are you? Okay... Do you want to listen in here? Yeah, no....

Thank you.

Okay, hang on a second. Yeah, we tried to call you earlier and it said you were out of the office all day, and so, I'm like, okay..

Yeah, I'm been trying to track the number down so....

I'm amazed you figured it out. There's a good piece of detective work here.

Yeah, how about that. Everybody's got messages from me though, I apologize to everyone.

..?.... when you get back to your desk.

I guess what we should have done was leave you a message giving the number and then you would have had an easier time.

Yes, that's the first thing I sent to his voice mail.

Sorry about that.

Anyway......

So we're talking about the using agent trends.....

DWS: We're talking about.... Hi, Kathy, this is Doug. We were talking about the different types of things that are used in tracking the trends. I'm looking at the footnote here, you guys mentioned revenue generation rates based on time of day, day of week, etc., and revenue generation is simply sales would be in a sales context..

INV: It could be sales, but it also could be services related where if your reducing costs, ..?... ~I should not have said~ revenues and ....?....

DWS: Reducing costs...
~Instead of it~

INV: ...?... calling/revenues trends, it could be this possibility ~profitability~ trends.

Yeah, that would be better. In a service situation, if there ~they're~ able to save money to the company by resolving issued worker... ~If~ kind of ties into the one ..and done

Yeah, ...

DWS: And lets talk for a minute about profitability that would also be probably within the ~a~ skill level or a call time ~type~, wouldn't it? Wouldn't you track that for instance, if I have different

[handwritten left margin: Data used in tracking trends]

types of products I'm selling, this person may be more proficient in selling product ..?.. on certain days and less proficient on the days, but he's better at selling product B. So you could have this broken down by product or service being offered by the call center as well.

INV: Absolutely.

DWS: And you could even have it indexed by agent skill set which is call type and skill set, I'm not sure are the same.

INV: Or you can get from a variety area, you can get it at some medium level or still skill level, an agent level and you can also get it from a customer level, at some point information out of customer database for that information.

DWS: Okay, when say at the agent level, your talking about relative to other agents?

INV: Well, the performance then would be at the agent level, looking at their performance as to other agents that have their skills, whatever would be at the agent level, but I would be tracking that.

Right, the trends would be tracked on agent level, I'm confused by the statement about customer..

There's a profitability close to applicants that are. as it relates to the customer calling in too, so for instance there use to be in the catalog business, so I would send out catalogs to a variety of different customers, some of which are more profitable than my business than others. And they would have a certain key code on the back of their catalog which would tell me how profitable they were to my business, as a group.

DWS: May be that's why I always get zeros on all my catalogs.

INV: I was going to say why? That's not so great.

So would that be, so your saying... I don't quite get that either. Is it saying that for the agent that we're tracking, how this agent performs with this kind of customer.

Right, right, so I have group A, which won't group by anything from anybody, because their just great customers, their just going to buy anyway. But would they buy more from certain groups of agents or certain agents than they were others. May be. And then I have line D customers that, like don't by squat. It's just a whim, it's like we get them to call in and buy something from me and my better paring them with a certain group of agents than another group of agents. Do they become more profitable with certain agents than others.

So it almost sounds like your taking about customer trends in that situation.

Well, ...?.. trends so, I might be the best agent that we have today, from the metrics that we're using to support what ..?... means today. But yet, when I peal back the onion, I might not be... I might work really well and help the company be profitable with one customer group over another customer group. So even though I'm the best agent, you might not want to send the best customer to me because I work better with the people that are just out there buying on a whim.

So, I sort of see that, because you know, it's sort of like, well we're talking about time of day for example...

Agent is better on these kind ... this time of day, well, agent does better with these kinds of customers rather than these kinds.

I mean you could look at it for instance like somebody who is high pressure verses low pressure in terms of sales, they might be able to convert some of those customers that normally wouldn't buy or may be the customers who normally wouldn't buy ...?... so their

-8-

really laid, who's willing to say well, have you thought about this. So.... I can kind of see that. So a real life example would be when I was actually listening to a telemarketing call that I had where the man was on the phone with this lady and she was telling him how she was making jam, and she was like reciting this jam recipe to him, but she was talking to him... I mean he was selling her and the people that were running the company were apologizing to me and I said don't apologize to me because he knows how to speak to her and she will buy from him, where she might not have bought from a high pressure salesperson.

Yeah, that would be really good to know, especially if your doing any kind of agent performance evaluation... yeah, you don't want to ding somebody because they handle those types of calls that make sales.

That particular agent only clipped two calls that hour, right, where others clipped 10, but he converted both those, and the others only converted 2 out of 10, right, you know, so he was a 100% for what he took, the others were only 20.

DWS: It almost sounds like we're... there's two things that are out on the table, one is patterns, another one is may be measuring new metrics.

INV: That's a really good point because how good is this product or service is going to be if there's no way for me to measure and proof this value back to the customer, back to our customer, our Avaya customer. I have to be able to measure it.

DWS: Yeah, but what are the new metrics that we haven't measured before that we're talking about here?

INV: Well we kind of start the run hand in hand with business analytics for me... to really begin

-9-

to pull apart and ~~mind~~ *mine* and model what my customer base looks like which many customers

can do today, more of of our, more advanced customers ~~arguing~~ *are doing* today. And then I've never

been able to do this at an agent level and I've really never been able to ~~pare~~ *pair* them together

in a meaningful way. So *the* ability is business analytics for me.

DWS: Because may be we need to go after those two concepts patterns using just standard metric*s*

as well as new metric*s* for pattern measurement and then trying to claim these new metric*s* in

and of themselves. But I need to have more clarification on what these new metric are and

it sounds like there all agent focused.

INV: Agent and customer focused for me.

Do you think we could actually claim the metric.

DWS: Sure, if you can come up with new ones. But we have to have enough clarification as to

what they are to distinguish all the art about skills and call types.

INV: I'm not sure it's new metric so much as making use of existing metric*s* in new ways. Mostly

in linking them, then being able to use them. I mean, I'm not sure...

DWS: So in new ways, you mean patterns?

INV: Well, I mean taking information that's in two different places and trying to ~~pare~~ *pair* it and then

doing the pattern kind of analysis on it and making use of it in terms of scheduling decisions.

Work scheduling.

DWS: So talk about the linking for a minute, because that really is the broadest way of looking at

your invention.

INV: Well, my....

Kathy, go ahead if you have something.

New metrics (margin annotation)

Linking (margin annotation)

-10-

Well, the thing I think your ..?..(really) [absolutely] on the right track, I think these metric live in many

places, I don't know... I'm sitting here going what new metric did I come up with. I ~~see still~~ [do]

want to think about that a little bit more, but it's how we pull them together to make ~~leaning~~ [meaning]

out of them, is that going to be relevant for the customer. So the fact that I only took the calls

today, okay, if I've sold both of them and ..?.. [if I only] took two calls in that hour if I sold or

converted both of them. I suppose to my ..?.. ..?.. [per who took 10 calls,] and only converted two. And what does

that mean and how do I ..?.. [weight] that to come out with meaning for me to say one ..?.. [agent] is more

highly skilled in this area than another. I guess I have to think more about it, but that's... it's

coming up with that meaning, what is that meaning.... and ..?..~~y~~ [why] and how is it relevant for

customers and I don't..... you all would know better than I if that could be patented.

DWS: Well, I mean anything can be patented if no ones done it for. But the question is, we have

to be able to identify what we want to claim with sufficient specificity to go after it and I'm

still concerned that, because we can always think of isolated examples, well... in this

situation I would do this and this, but if you try to ...?.... [each] situation independently, your going

to have a zillion claims. There has to be a common thread and may be you guys should think

about that.... may be flush that out when we work on the draft of the application. What I can

do now is just focus on the pattern aspect, because that really is the heart of what you guys

are going after I think. Collected operation data may include the average amount of time

spent in the contact and what I just heard, you say Kathy, that it could also consider the

percentage of successfully handled contacts. Even though the amount of time may be high,

if the guy's a high percentage of successful completion on contacts, then that's a metric that

can be used in determining patterns.

INV: I would agree with that. I think that would fall nicely into the one in 9... as well.

And I think what she was saying there too, is your tracking it based on some metrics of the call, like what kind of customer this is for example. So then you can compare that, so okay, this person has a success rate of whatever, some percentage... but you want to type that in with the kind of calls there in... so what percentage of success rate did they have with this kind of call verses sort of the average, right. So if they do better at this kind of call then the other agents then... we want to get that kind of call to them, you know, verses, well, they had a success rate that was higher on this other kind of call. But relative to the other agents they did worse, so in that case you wouldn't want to give us a call. So your right it is trying to measure it against some sort of metric you know you've got first the overall, I would think.

DWS: So you have.... and I think the key thing here is, there's also another factor that your waiting is part of that which is this dimensioned a determinated pattern, time of day, day of week. Also not only temporal but also just event based. So you kind of have two ways of looking at the pattern, one is this purely based on time, the other one is based on event or combination of time and event. A guy comes in first thing in the morning, gets a bad call, he's trashed the rest of the day....

INV: He's trashed the rest of the day, exactly.

DWS: So there's.... I think that pretty much is the metric that using to determine pattern, either event or time based.

INV: I mean I guess the thesis is that people have rhythms and preferences in the way they work and if we could discern that and try to steer things to them, so they'll be successful, then things, I mean, lots of good things come out of that for the business.

-12-

I think your right, it's time and event... like what ...?.... let's say three of these kinds of events in a row, based on that we can predict that your going to do this on the next thing, so we can make an intelligent decision.

DWS: And overlaying that is, the fact that your looking for patterns based upon call time, agent, customer. I mean all these metrics then that come in....

INV: Media type.

DWS: Media type, so you could actually have a series of patterns for a given agent, you could have the time of day or event based overlaid with media, then have the same thing overlay with customer type, have the same.... so then you could consider all that *in* matching and you could say, well, e-mail this customer type...this time of day, this guy's the hottest, then you assign to that queue for awhile and your moving these people around.

INV: ~~Their~~ *about* like your concepts abµt reserve and backup agents, because they may not be peak performing during a certain period or after a certain sequence of events, but we want to keep them in that skill as a reserve or backup in case the call *from* the contact center demands that they be activated despite the fact that that's not their peak time.

DWS: So the collected data may then be analyzed to determine any trends related to time of day, day of week or event. ~~One~~ *When an* agent has... *Media type,* media type really isn't what you determine the pattern based on, it's one of the things that.... I think it's either time or event.... then you, with that in mind, then you would begin to look at other factors which would be media type, revenue, call type, customer..... It's kind of like you have two tiers of factors, one, on the one hand, your either going to use in your ...?... *plot either* an event based or time based variable. And then

-13-

on the other axis of the plot or... I guess it could be multi-dimensional. You would have these other factors, the second group which would be....

INV: And your looking for a correlation between those, you know, certain times, certain media or better worse, that sort of thing.

I would say, the way I would like at it, I think, ..?.. the thing about this is if you have an event, there's going to be attributes associated with the event and media would be an attribute, customer type would be an attribute.

DWS: That's true.

INV: That's the way I would look at it.

DWS: Yeah, and may be when the guy works on e-mail for 1 hour, he gets bored and his performance just drops to nothing. So then you pull him off e-mail and put on *him* live contact, because some people just don't work well.

INV: Just saying... that's exactly what we thought when we were coming up with this idea was, you know, this person keeps getting that same... their doing really well, but they keep getting that same thing over and over and over time, their performance starts going down.

DWS: Their highly extroverted and their doing..... *Adv. Take personality, needs into account*

INV: And they just key... you can't just keeping giving them more e-mails or their performance is going to keep going down, so what you need to do is give him another kind of thing, you need to give him a voice call now, you give him 3 e-mails in a row

DWS: So pattern could also be as you assign them, as you discern certain patterns for this agent and then you begin to proactively change their work, that's creating new patterns. Well, when I put him on e-mail for now, I'm going to put him in this queue and then I put him on this

queue, he does much better than if I take him off e-mail, put him in a different queue, then put him in this other queue. So this ..?.. self-feeding.

INV: Right, optimizing.

DWS: Yeah, that....

INV: Yeah, that raises another dimension to this and Kathy probably has already figured this one out. Okay, so your moving this agent around based on their behavior patterns. Now as a contact center supervisor, how do I show that I am using this agent...\

Optimally...

Optimally.... Well that's something we need to consider. ..?...

That's an interesting question.

Because it's like we don't want to ding them because they move every half hour to a different media type or some other dimension because the pattern has indicated that that's the way they work, they need something new every half hour.

Or Work today, there just having an off day. So I want to move them to different work, their not feeling well today or whatever happens to them...but usually it starts a former, they're a star performer but today, it would probably a good day to just be an e-mail.... well, ...?.. no.

Yeah, you did raise that during our discussions where the supervisor might be aware, in a manual situation, the supervisor might be aware that a certain person has laryngitis that day.

Well, you don't want to give him voice contacts....

No matter what their trend says, it's going to be ...best

DWS: So with that in mind, with respect to the inputting all these metrics, is it stuff that you collect, you can collect right now from existing call center data stores, or are you going to

-15-

be creating new... you have to input new data, new tracking mechanisms to do all this stuff.

INV: Well, part of it is the combination of data like Sarah mentioned earlier.

DWS: Your not tracking really, or are you tracking success... I thought when we talked about ~~what~~ *one* *and* ~~it had~~ done, a lot of call centers are not tracking... if it's not a successful sale, their not really tracking what happened in the contact.

INV: That's why we have to have access to whatever application data there is, so if they've got a seibel system or something that's tracking the outcomes.... I mean... .we

DWS: What is seibel?

INV: Seibel, CRM application, it helps the agents do their jobs so it has screens that are specific to the type of job their doing.

It has the business data....

It tracks all your customer data, so if you are a customer of a particular company, only your data would be in a system, it could be seibel, it could be oracle, it could be in ...?.. *CBZ* it could be in people ...?.... *Soft* there are many vendors in that space.....

So when you call in and give them your customer number, then the information that they have about you would pop up and *then* they would have a place to order entry or whatever it is that their task needs to be for fulfilling what you need to do. But that data, we could... there are systems that collect that data, it's not collected in the call center or the contact center database, but it could be linked through the agent to the call center information. That's what we need to do.

DWS: So I think there is really two parts of this, one is the module that identifies trends... and then the module that does *the* agent assignment. Is there...?.... it's ...?.... flipped over. Is there

Data Collection

t|w

[handwritten left margin: H|w]

[handwritten left margin: Trend/ pattern id module]

anything in the trend identifier that's unique or novel ~~where~~ *[handwritten: maybe]* we can ~~put~~ *[handwritten: do a quick]* flowchart ~~forms~~. *[handwritten: for that]*

How would we do that? Because presumably this thing would be going continually. It would be examining old information and new information and it would be doing it on an agent by agent basis, so....

INV: *[handwritten: In]* Realtime too.

DWS: It would be.... it wouldn't....

INV: *[handwritten: You are applying]* ...?... ~~imply~~ the trend... the trending information to the next event that's happening to determine what you should do.

I think there are some.. I don't want to rule out the historical aspect because there are some trends that repeat for a longer period of time.

No, but what I'm saying is you... it's a trend over a long period of time, but we want to apply the information from that trend to *[handwritten: the]* ~~next~~ event.

[handwritten: In a real-life] ...?... situation, yeah that's fine, I just want to be clear that there's difference between just looking at this point in time verses... I mean I'm thinking that you could have like a score, you know, your business can define what they want to score and when, what are the parameters of the scoring and then based on that score, we know that, okay, you don't perform well during this time period, on this ...?... *[handwritten: media channel]* ~~in general~~, or whatever.

Well, just like you were saying, even day of week, whatever.

So, there's something else I'm hearing too, is that we need to consider the pattern that we set up for the agent or that the system has set up for the agent as it relates to the scores ~~field~~ *[handwritten: too]*. So, if I say, no, you know, 8:00 to 10:00 in the morning I want you to do e-mail and then I want you to do *[handwritten: voice until]* ...?... ~~til~~ noon and whatever that pattern is, and then I want you to work with our

gold customers at 1:00, when you get back from lunch, what impact does that have on the agent or ~~some of~~ profiling perspective all of the other agents that I've profiled that way, how are they performing and has the template that I set in place for the agent, where the system has set up place for the agent, what impact would we expect it to have on that particular agent. ~~Does it seem to be~~ smart enough to do that? I hope I explained myself well.

So what your saying, the question your asking is how do I know the agent's actually performing better. Is there performance, you know, improving over time. So you have to have some metric that measures an agent...

...?... why I just stack the deck against them. I mean that's really my question, you know, and I certainly don't want to do that, I want to run it as optimally as I can, but somebody's stacked the deck against them.

It's kind of critical that this particular idea that we have some measure of performance, because otherwise, your right, it's like, well we're doing all these funky things, time of day and day of week, and we've gotten these in, you know, this agent does better in these kind of events, at this time of day and we're making all these decisions, it's like well, are agents actually doing better, with all this. I mean that's sort of a bottom line question that....

Is there a modeling that says based on the history that your talking, based on the history of how they've been operating, if I change the model up this way, and change their ...?... this way, what impacts would I see.

Interesting, well I think there were two things in your statement, Kathy, and one is how do I show the agent is improving in their performance, but you also talked about comparing to other agents, that becomes a real challenge when it's not apples to apples because different

-18-

agents are going to have different trends and their going to be assigned different tasks based on their patterns.

I think, what I thought you were going to say also is that you probably want to assess the performance of the center *and* overall, so given the kind of traffic that you had, wherever it came from was of this type, what was your potential and then how did you do against that.

Because when your talking about did the agent actually do better, I think what your asking is, your asking us to assess it against the road not taken and I'm not sure how we do that. I mean, we can do some kind of a simulation given the kinds of traffic loads that we had, and the mix, but that's getting to be quite an interesting project. More along the lines of research, I think. And I guess I was thinking that the one thing we would do is, at least to start with, you take the trending information and feed it into your scheduling package, so that you start to rearrange your agents based on what you think their preferences are and take a look at that because you have to look at your overall staffing, I mean you can't say, well, everybody hates calls in the morning so we won't answer any calls until 10:00. I just don't think that's going to fly.

Or nobody wants to answer calls to night...

Right, ever, ..?.. that's too bad. So...

There's a lot of good questions out of there, you know, how do I ...?... just performing, how do I compare them to other agents, how can I ensure that I'm not stacking the deck against them with the templates that say and we have selected, right. Based on history, this is a simulation piece, if I change the pattern, what, in fact, would I have. Yeah, there's a lot to that isn't there. It's very very deep .But it's something that's really trying to get at the under

current of how am I performing and how can I ensure that I'm performing optimally. And out there in the marketplace, if there's a way I can do that, I have a huge competitive advantage.

So, I'm going to have to leave Doug, what do we need to do in order to make this work?

DWS: I think we need to just do a flowchart of the pattern of the trend analysis module, the call handling module, we would just, or the agent, whatever, the contact handler we would just do the standard flowchart and then just have a box saying where we would overlay the trending information as part of the decisions as to what call gets sent where, what agent gets sent where. ..?.. have that ....?... for this.... Lets see.... I guess we don't have them. ....

INV: Yeah, I guess, I would think may be you would start with having the trending analysis go to the workplace management system and then having that adjust the agent work schedule and also by adjusting their skills. What their going to get, you know, what their available for, during particular times... at least start that way, rather than trying to bite off the real time pieces, because I think that's going to be trickier.

DWS: Yeah, because if you just do it, if this thing continually selects an agent, does the analysis, then selects the next agent, does the analysis, selects the next agent, does the analysis, it's not really realtime, but it's going to continue and be updating its trend analysis on an agent to reflect newly received information even though there may be somewhat of a lapse in....time

Alright, no problem.

INV: ...?.... You have a ...?... it doesn't stray ..?.. key to this is, well I don't know, did we talk about that...

They handled this event and they didn't do very well at it right now, so now we're going to

-20-

change our whole..... I thought the whole idea behind this was, we got this pattern over time

that we collected and we're going kinda try to stick to that, you know, for now, we're not

going to change things on the fly here because they did ~~that~~ [bad] at the last .... *he did bad on the last*

INV: Right because we did not want to make the assumption of just because ..?..lost contact, that

that's a trend.

DWS: ...?.. we just start with the flowchart. Just, I guess the first whole that we start, the next one

would be next agent... so start... select agent, then what are we doing for that agent. Select

time of day, select ....

INV: I guess I was thinking of a different flowchart.... where ...

DWS: Just draw it on the board, if you don't mind.

INV: ..?... side here.... I think we're going to be drawing on the board, so....

Okay, well, make sure you write clearly...

Okay, I'm going to have to stop right now.

So far, he hasn't written anything.

Somehow we have ~~flex....~~ *to collect the metrics that you use for trends*

~~electrics..... ..?.. just for .....?.....~~

I guess through this process, I just want to ensure that, and I'm sorry for all the brainstorming

here, it's probably not the appropriate place to do it, but we're still in fact with what we've

already conceptualized and I hope I didn't derail us to a point where we're not there.

DWS: No, I guess what we're focusing on is identifying how we're going to approach the patent

application as far as the different software modules and the key one here is the pattern or

trend identification module. And that's what he's putting upon the board.

Flowchart

INV: Oh, okay.

It's ...?...   I guess, it's like collect the metric and then I'd say you'd have to identify the patterns. Collect the metric, identify patterns and then as Sarah was saying, and I think we need to think about how this should be done and our realtime environment, but I think the simplest first step would be to feed this into a workforce management application and that would be into the agents scheduling.

Are we then saying that we need to have a work force management application in place in order for this to be a viable product for customer.

I think that would be an example, Kathy, I don't think we'd want to say it's a hard and fast rule that you have to a work force management package.

Right, okay.

Okay, and thanks for that verification. So you feed into some module or application that controls the agents scheduling, controls the agents, you know, going back to Doug's point, it could control you know whether or not, which queues there in, it could control which are they a primary or backup or reserve agent, so there's some controlling module that says the agents available for these types of contacts during this time period or after everythings...?...

Is that what work force management does is give you that sort of granularly ..?.. this time of day. It changed things based on time of day, kind of stuff or....

Kathy, does the work force management packages get down to level of saying that I want this agent to be working on voice calls for this time period.

That's a really good question, I think the work force management will get to the point where it says I need an agent to work on voice calls for this time period, not a specific person.

-22-

With work force management today, I assume, I believe they have, okay, this agent is

scheduled from 8:00 to 5:00 with a lunch period between 11:30 and 12:00 and a couple of

15 minute breaks and then have training plans in there, so it probably does not today get

down to the level of skills and ...?...

That's correct, they don't tell you, you need 5 agents on in that skill set, to handle voice calls,

so I'll need 5 agents to handle gold voice calls coming in between the hours of 8 and 10.

Yeah, so work force management is probably the wrong thing.

Well your going to need a package like that to ensure you have coverage, so the example I

would teach, but I wouldn't make it so that it's limiting and other possibilities where I have

customers that don't have work force management packages. So, to Sarah's point, you

know, I got to make sure that my calls are being covered, as they come in.

Okay, so you have this agent scheduling, I'm trying to think of a word there that where it's

assigning queues verses, you know, primary/backup reserve. I don't know what that is

called.

Well, I call them agent templates, if it's at the agent level, what is their template, what skill

sets do they have and are they a reserve or a backup or primary for particular skill or service

class.

So you think the agent template would be updated based on the patterns?

It could be.

That makes sense.

Okay, so based on this agent template, that determines what types of contacts that or task it

doesn't have to be contact, type of contact or tasks that is assigned to that agent. It's one of

the factors in the decision, it isn't necessarily the overriding [overwriting] factor. Does that make sense Kathy?

It makes sense, I want to make sure that I have coverage for all the work that's coming in to it's appropriate level, service objective or level and I still want to be very fair to my agent, I want to optimize that. Today I can say I need 5 people on voice for Gold in the morning and then I can run adherence [inherence] reports throughout the day to see if first of all the agent is trying to perform in those tasks and is the call volume of these calls because it is easier, coming in at that rate to still say that I need 5 agents, may be I don't now, may be I only need 3 or may be I need more, may be I need 10 depending on the call volume coming in for that particular skill. So we have to consider the inbound work volume and how that impacts all of this trending to.

Yeah, so you have to consider the contact center environment and how that factors in and how that maps to the agent templates. That makes sense.

DWS: So the agent templates would include basically the agent profile plus any trend information.

INV: And their [they are] history, right which would be the trend I think your talking about and those patterns.

DWS: So are we done with that flowchart?

INV: I think so.

Well, I do think that we... don't we need to expand a little bit on that collective metric.

Oh come on, as far as the operational data and the business data or.....

Yes, like what metric are we collecting here and like when...?. the thing [s] we talked about is like things like time of day, day of week, that kind of stuff as well as event type, what kind of

-24-

media, what kind of customer type.

Okay, you want time, event, results,

DWS: Media, customer, type

INV: And I would include like....

DWS: ...call type

INV: ...media customer type as type dimensions that are variable, so a customer could define what

dimensions they want to build this around. Because one customer may choose customers,

groups of customers and other customers ...... media type....or both, I mean..

DWS: I want to elaborate on the identified patterns and I just did a real quick flowchart, I'll just

throw it... I think the easiest thing is for you to look at what I did, save me the time.

Basically, this is what happens in this box here, you start, you select an agent, then you

retrieve the historical data in the agent template for the agent. Historical data is basically

this, in the metric. It's just.... whatever information you have accumulated about the call

center is related to this agent, just get it. Then you select the criteria to perform the trend

pattern analysis and that's kind of free floating because there are so many different ways you

can do it and we've gone through a lot of those during the meeting. Then you analyze it for

the pattern, then you update the agent template to reflect any patterns you identify, then you

just get the next agent and just repeat it.

INV: And this could be, I mean, and this process could be done periodically...

Yeah, this doesn't strike me as a realtime thing.

DWS: No, it's based purely on historical. Now what happened 5 minutes ago all of a sudden is

historical, so it's not realtime, I mean it's near realtime.

INV: But you could run this like once an hour or it could be continually going on through agent *for each*

over a period of time and it repeats every hour.

DWS: And something else you could do, you could do...

INV: ..?.. do once a day... *depend on* *You could*

It depends on what your granularity is... *depend on*

It could do how

..?.. opt to do.. so many contacts to, so you know, if I have lots and lots of interaction during

an hour, I might want to run it by you know every 20th contact or every 30th, whatever that

number is.

DWS: And something else you could do is you could... and they may be doing this already in call

centers, but you could, for each agent, kind of a trial period where you identify the strengths *have*

and weaknesses of the agent by putting them on different, in different situations and then

monitoring what happens and then you run each agent through the same set of exercises and

when your done, you kind of a base comparison of apples and apples among all the agents.

And that would be... you could use that preliminarily to identify some early trends and then

just kind of use that to guide the trend analysis down the road.

INV: I really like that because I was struggling with how would you start this, right, type of

engagement with the customers, so how would you go out and say okay, we're going to put

all these systems in now, we're going to help you do this and then their going to look at you,

and say, well how do I design it to get ready for that. And my answer before you made that

statement would have been well what skills does he have for them today, what skills does *sets do you* *do*

he have in place for them today, you start with that template and then let the system learn *you*

over time.

DWS: And I suppose you could even do, you could even give personality profile tests which would give you an indication of how you want to structure that test protocol, if you will, or that series of exercises, that are just standard exercises. If the guy is an introvert, you may want to focus him more on media that don't require live contact and see how he performs....somebody *that is highly* extroverted, may be you want to do a different protocol that's focused more on live contacts and different types of live contacts.

INV: And your doing a lot with these experiments *with* that too or use... if you start.... also add in other data that says my preference is not *to be on the phone* really until 10:00, just because I'm not a morning person.

DWS: Yeah, and I'm not sure we can really throw that in claims, but it provides nice background of how you would initially start this thing going. And then over time, the agent may grow bored with his job duties and want more challenge which means he want to work more live voice.

INV: Well I think we need to make it so that when you start up the system, you can manually design those templates for an agent based on what the supervisor knows about that agent whether it's through testing or actual experience, but then also, I've, based on Kathy's statement about modeling, at some point you may *write a* ~~run them~~ modeling... ~~and~~ *that* indicates that may be a different template would be different for this agent, so you go in and redefine the new criteria or, you know, ~~tramers~~ *parameters* within the template and then you try that out and over time you try just to make sure that new template is working out. So I think you need to be able to, initially set it up and *to* ~~m~~ potentially manual change later in time. *If it that way, it does not sound* Yeah, you know, when you say ~~about ..?.. out, they think~~ that we're starting off being very

Pattern Identification

-27-

fair to the agent and very agent friendly, I'm going to use that term with the agents and then

at some point in time, I say okay, business is business, this is how your performing, this is

where I'm going to put you because I can optimize your talents ..?.. varies, whether you like [in these areas]

it or not, kind of thing. I mean you might end up with a ..?.. kind of interesting. [an order to the agent]

Are you saying that's good or bad?

No, I don't know that I can make that assessment. I think it'll be good in some cases and

may be the agent won't be happy, but their performance will be optimized. But the business

will be happy.

I mean the agent could go to the supervisor and say, you know, look, I'd really like to start

training to do more or other certain contact ..?..to a certain..?.. whatever. And there's...? [at] [time]

As far as training classes their going to do that too, right. Bring them into a different ..?.. or

...?...

Exactly, which it would be really great if we could feed the training results into the

identification patterns. [result of that]

I think I have two single results, not just the testing results. What is the ..?.... training you

took. How does that compare to the group of people that came out of the training.

But I think we're going. I was ..?... now...

DWS: I think, I've got a pretty good idea of what's going on and I think can write the application

now. It's going to have a lot of blanks for your guys to fill in. I wanted to find out about

inventorship. What did each person contribute to this or if you can't really break it down,

just confirm that the group kind of collectively come up with the concept of pattern or trend

identification.

-28-

the problem arises what people are dong now and what their not doing. And then we can

move on to the invention... we'll just put ah.... we could just draw a system diagram when

the call center with agents, come up with a name for the module that's handling this and I

would assume we could use the same drawing on all three of these. And then just do a

flowchart of the module that's collecting the... is this true value.... collecting the information

and then there would probably be another simple module that whenever a call comes in, you

would access the database, look at the records and do a simple comparison of value verses

estimated waiting time and Gold ..?.. call center... I didn't realize there's a ton of patents in

this area.

INV: Okay, I think the basic problem here is that we don't take into account how valuable the

customer is to the organization in determining how we're going to deal with that customer.

That's the sort of...?.... problem. In other words, we have there's a lot of information that's

kept about, you know, may be what kind of customer this is and you know, what kinds of,

you know, abilities we have to service that customer... but this is saying that we're going to try and figure

out what the actual value is of a customer.

DWS: I know that people have patented the idea and I know we have some applications pending

right now where sales history, is one of the ...?.... .....?... indicia used in signing a value to the customer.

People have assigned values to customers before. You identified some of the reasons we

look at sales history, they look at socioeconomic, information....

INV: Yeah, demographic ...?...

DWS: Frequency of contacting the call center...

INV: But most of that is trying to predict the profitability... or not profitability, but the revenue that

a customer would drive and what this is trying to get is the profitability so one of the things we talked about was we don't really get kind of a handle on the cost of servicing that customer.... where both my initial sales cost as well as and cost in servicing... so I might have a customer that calls all the time and I don't, I may think that customer is profitable.

DWS: I have a few of those.

INV: ...?.....

I may think there profitable goals, but it turns out because their using very expensive research or whatever and once I know kind of their true....know this true value, I can move those customers into becoming profitable customers, because I could move them to either self service or other things that are improving their profitability. Because right now, I think what we do, is we focus on revenue generation and not what it's costing me to generate that revenue. In fact, you might have a customer who buys a moderate amount, lets say, from you, but does it in a very cheap way, so you use your web interface, so whatever which doesn't cost you very much. They never call for assistance, they just... their cheap, it's easy money in a sense that the margins are good. Whereas, you might help somebody else who is a high revenue customer, but also is a high cost customer because their constantly under -sale ...?..... sales or for whatever using the most expensive resources. I think that's the big part of what this one was. We've got a lot of data in the call center that says what your costing ...?.... and you haven't used that in computing your true value. And then making the right decisions based on your true value.

DWS: Once you know the true... well, your looking at the cost so you could.... oh, here it is, yeah... your doing... once you determine the cost of servicing, then your subtracting that out from

-31-

the revenue and your actually coming up with a net value of the customer. It could be

negative, it could be positive.....

INV: Right, ..?... negative because your cost could be really high and the customers are always

buying things that ....?.... whatever and it turns out your actually losing money on ..?...

...?... return more than that...........returns or ..?.. the cost of that.

DWS: So revenue would be basically items sold, less items returned. So you would consider

returns.

INV: ...?.. should include that in here, yeah. You ..?.. understand true values. So you kind of see

and I think, in a way, customers... many customers,.... a lot of customers look at pure revenue,

some might look at revenue ..?... margin... but they don't ..?.. this contact ..cost

They don't really see the picture of the cost...

DWS: Has anyone ..?..knowledge in the call center ever looked at revenue less any cost ..item

INV: Not that I know of.

DWS: But just even the idea of reducing the revenue figure by cost is novel. Then we drop down

to the.... I think, within a call center application... I mean accountants do it everyday... but

are we doing it to identify the value of the customer, this is the...

INV: In the past, ..?.. talked about like lifetime value, that their computing a lifetime value and

some.... you know, I think that's been vague enough, or just thrown out there, that it could

include, some people could have ..?.. in the passes, that oh I'm going to track down...?.... and

there's my profitability. I don't think it's very common.

DWS: Do you know for a fact that anyone's done it or is it just conjecture.

INV: I don't know....

DWS: I would claim it that way, where your and I would do it in an environment and the environment is a contact center where your allocating resources based upon a value associated with the customer, wherein the value is a revenue less a cost associated with that customer. And that's basically the claim. And then we...

INV: We have one claim around I would think cost alone.

DWS: Or just any cost.

INV: Or just any cost, okay. ..?... then you ..?.. have claims that ..?.. the cost, the various cost ..?.. center cost of return, cost of service and cost of sales.... cost of goods.

DWS: That's good, cost of returns which is self-explanatory, cost of sales which is

INV: Cogs.

DWS: Cogs.....

INV: Well, no, and usually ....?...
And it's also there's a cost associated with you know the, in fact we talked about that, ..?.. for sale and somebody calls into the center and there's a cost associated with that, right, you have an agent
...?.. do a self service or whether they do a ..?.. service ....cost

DWS: So there's... from an accounting standpoint, there's fixed and variable costs. So we would identify both and the cost would..... wherein the cost, the cost is fixed, then the cost is variable... under fixed costs, we have costs that get sold..... Does that include variables

INV: ..?.. variable...

Fixed cost would be...
It would depend upon how many sales ...?...

-33-

DWS: Overhead.

INV: ....?.... the total cost of your... *policing of*

Electricity for my center, ..?.. from my center..... .....?... *of good*

DWS: Variable costs would be costs that had sold.

INV: ...?.. cost... *is variable too*

expense *of goods*

DWS: And then this contact extends..... And that costs that get sold. It's been a long time since I

took my accounting class. That's determined based upon... There's no overhead allocation

in that, that's purely based upon

INV: ...?.. typically it's just your variable cost for each *each* *product*

DWS: So the manufacturing costs define a manufacturer would be if I'm a retailer and I'm a middle

man, it would be the cost I get charged for the item.

Anything I can attribute to *costs of*

INV: ...?.. that one sale. There was some and I.?./manufacturing that I probably can't break out

Invention

...?....

DWS: This contact expense and apparently there's a variable and a fixed cost associated with that.

Why don't we talk about that?

there are

INV: ...?.... more ...... So, I think, equipment costs, sometimes my network transport could be

or fixed *I'm using and stuff*

variable assist and I could be.... depending on my type of media that I use in the ....?... but

So *is 800* *for a* *and that kind of thing*

I think I can buy ...?... under the service ..?.. variable rate or .... With ...?... things in

the contact expenses, I don't really have the actual ....inaudible

due to all talking at the same time................... variable ...?.... agent.... ..?.. estimation,

average

okay, this is .... And I have the big....... so you have ...?... for each cost or agent time

times agent

.... Well I think your... I mean your agent cost is variable in the sense that, depending

-34-

on how long you pay with the agent, ~~you netted~~ _that is_ a transaction or a contact related cost.

How much time it takes you.....

And you could actually calculate an average agent cost per dollar revenue...for a particular transaction for that customer......

There are fixed costs and...... associated with ../.. agent ..?.h.x.x _having that_ _there to_

Right, sure.

DWS: So there would be an overhead allocation for that specific agent, then he would have to break

Invention   it down in _to_ days, break it down into hours and look at the duration of this contact.

INV: All the contacts for .....

DWS: All the contacts for this customer...

INV: For this customer...

DWS: And then allocate the overhead ~~with~~ _to_ that.

INV: And which, like she was saying, it includes every contact with the customer whether there

was a sale or not a sale and I mean.. a customer may call in, talk to you about buying

something, but they don't buy anything, and then they call you 5 times and finally ~~at quitting~~ _the _

time they bought it, and then after they buy it, then they call you 5 more times trying to figure

out how to use this thing and ....   It's all, every contact that that customer makes, ~~it does~~ _with us_

Now, when we, and you have this down here to, but one of the variabilities in variable cost,

    skill level   _I_

would be you know, the ..?.. of the agent that require, so depending on this particular

    maybe it is

customer, for whatever reason, ~~made it~~ the product their buying requires a higher skill level,

so it has a higher cost, so the average cost really should be the skill level.

    SUM   _SUM_

Well it's really the ..?.. say, the ~~sound~~.....

Oh yeah,

So yeah, this time they contacted a chief agent, so that agent's cheaper, and so that's going

to be factored in verses other time they contacted ....expenses

But you kind of want to take off the variability... of, they just happen to get a brand new

agent, and they have to be ~~achieved~~ cheap. I'd rather do it based on the average for that skill or

something as opposed to the average to that one agent is all I'm thinking. ..?.. ~~require us~~.

If they require a more skilled agent then less skilled agent based on.....

DWS: So you could split your agents up into groups and you could do.....

INV: You could ..?.. average say ..?.. per agent or agent group. And you probably want claims around

both of those.

DWS: We have different skill levels... you'd want to split up in groups. ..?.... ~~once~~ An agent cost

would include the agents ~~sales~~ salary and investment. Basically it's any expense that is unique, or that is associated

with that agent, then the agent overhead is any expense that is not specifically associated with

that agent. So if he has special specific types of equipment on his desk, that other agents

don't have because of the skill level, then that would be factored into ~~this~~ his cost, ~~a sale rate~~ his salary.

INV: His overhead.

DWS: Okay. And you could also do something with, I know this is kind of ..?.. out ther but couldn't you

do something with opportunity costs? Where I have a highly skilled agent and somebody

calls in.... ...?.. ~~anything~~ maybe this is already being done, but I have 5 people in queue and if I put a customer on that

agent, prevents himself from servicing somebody else...

INV: And we do have ....?.. that's pretty much the way a maximizer works. The more skills I have,

the least likely I'm going to get things to work, because my of my opportunity. cost

DWS: So that's where you ...?.....

INV: Yeah, yeah.....

DWS: So we have to be careful that we're not focusing on hypothetical cost here, this is a hard cost

item

INV: ....?..... you could have done..... yeah, some of ....?... Well, and I think part of this,

the idea here was to be able to go through a queue that's waiting and say, you know... instead

of saying.... who's waited the longest.... you say, which of the people who are currently in

queue, where do we the biggest profit, so which one should be chosen next. Potentially, your

how long they have   *it does not have*

also taking into account ~~along been~~ waiting, but, I think that, but, yeah, ~~there could not~~ be *to*

the only   but

...?.. consideration.... ~~this~~ is a ~~re~~consideration.

goals for the

DWS: Yes, you could have policy ~~go through~~ a service center, presumably whatever queue their put

in has to be serviced within a certain period of time and issue.... this would be, when you

have the flexibility to make this decision, you would do it, but as you approach that policy

criteria, you would .....

INV: potentially ...?....

Potentially or not.... I mean, they would have a choice.

And this became the most important factor then you wouldn't throw it out if your like the top

gets

guy that...~~..?..~~ precedence over time. It depends on how you want to do it, of course...

I mean you could still... I mean... it gets complicated because you could say, well, ...?., if my

serviced within

customer is the highest value it's going to be is, ..we predicted it's going to be ~~obvious that~~

the expected

...?.. service time, then fine, lose them, we'll take the one that's out of bounds. But if not,

person of highest

we're definitely going to go with the ~~personal~~ ..?.. value. that kind of thing.... I mean,

-37-

business ...?.. can get pretty complicated, but...

DWS: Then you could also, that one case we worked on, one of the things we talked about was
offering alternative service arrangements for somebody ~~who is here~~ *in a* and may be the value
would be used to identify whether you want to offer the person to go ...?... *an automated* to ..?.. resource

INV: ~~Message from .... trial website.~~...

DWS: So this would be used to allocate the agent from a group of agents or to allocate different
types of resources to the people waiting in ..*a*..

INV: *Types* ..?.. of service... You got it.

DWS: The agent cost is the summation of agent time...

INV: Historically agent time ......?....

DWS: Oh the agent cost could be historical or ..?.. the customer value could be historical or based
over some predetermined period of time *because* presumably information will get stale at some point.
I got a customer for 20 years with the devaluation of the dollar, it makes no sense to include
information 20 years ago.

INV: Yeah, and that's true, this would need to be refreshed with each interaction, right, my true
value needs to be recalculated with each interaction or at the completion of each interaction.
And I'm assuming that it relates to some period of time and I think you could do a wait
weighted
(data carries a higher weight)
list...... like we do with everything else, the most recent ...?.... in my true value ..?...
calculation

DWS: That's a good point.

INV: ..?.. take that little business scenario thing that I wrote up and we talked about that having...
waits
this particular company ~~will wait~~ the last 6 months, you know, heavier than the time before
that. But you would really want to make something that's ...

Administrable or whatever ...?....

Yeah, how they want to do it, how do they want to weigh it.

DWS: With respect to agent cost ...?.... this is all media types, right. Really this should be resource cost, shouldn't it.

INV: Yeah, it should.

DWS: Does this include automated or human resources. The agent cost is equal to the summation of the agent time, does that basically do.... what he works every day? 8 hours

INV: No, that's just ..... it's ...?... a time per contact. for this customer..... so the summation for this customer for each contact the time, times the cost.....

DWS: Sort of dollars per minute probably. And that would be a combination... no that would just be... cost is for the agent cost, contact expense... okay, so aren't you double including some numbers here, you have variable costs is equal to agent overhead, then you have fixed cost and contact expense, isn't that a double inclusion.

INV: Lets see..... the variable cost would be the agent cost plus the fees in overhead.

DWS: But the agent overhead is going ....

INV: It's fixed.

DWS: It's fixed, so wouldn't it just be variable, would it just be agent cost or the variable cost because the fixed cost is going to come in through the overhead in the prior equation.

INV: Well, I guess it depends on how you do your accounting

Oh, well you ,..... **inaudible due to talking at same time....**

You have the ....?...agent over head as being specifically the management which is going to be variable based on how many agents you have, supply costs for the agent and then our surface cost

-39-

of the agent.

DWS: So your right....

INV: Well it's a very variable cost but then that cost associated with a particular contact, because there not, we're not paying for that, you know, so many dollars per minute for these things.
~~Well, ...?.... the~~ agent..... So the contact stamp is my variable agent cost plus my variable non-agent cost, plus my fixed cost. I mean that variable overhead, I ..?. pretty much if you do a substitution...

DWS: Yeah, you'd have to define ~~each ...?.. had to be~~ cost which are overhead, but specifically eligible to that agent. Whereas fixed cost is anything that is not specifically ~~eligible~~ to this agent, it's more whether that agent is there or not, it's still going ....?.... And then you have agent overhead....okay, there you have it, is equal to management ~~for~~ supply costs, plus ~~is~~ out of service cost, what that is...?....;

INV: The time the agents not handling contacts, because you will got to pay the agent for ..?.... ..?. sitting there for ...?....

DWS: So what's the dollar value or how long is ..?...

INV: It's essentially the occupancy. I mean you can't to work, have them working every... You see, ...?.... non-working costs that your paying them for

DWS: Cost per....?....

INV: Think of a better way to say that. There still working, but it's not contact related.

DWS: So why wouldn't be captured in agent cost for time?

INV: Because that's per each contact.
That's the time ..?.. the contact with the customer.

-40-

EXHIBIT B - CONT'D.

So that's where you need... and you can't really allocate the out of service cost to each

customer.

You don't want to.

Well, she'd do it somehow on a percentage basis ....?....

But if I am working

DWS: ~~Would it ..?.. work in~~ 8 hours a day, simple, when I'm working 8 hours a day. And lets say

my salary breaks down each day to .... ?... *$200* a day, whatever is reasonable, I don't know what

they..?.. *make* And so I do a dollars per minute computation on myself which includes my ~~old~~ *out*

cost

service calls, so then when somebody calls out, I'm basically taking my time for that call plus

my dollar per minute time on average. And what your saying is, well, if that's true, you

could do it that way or you could be a little bit more elaborate, you could say well, I'm going

to take 8 hours, an hour lunch, therefore it's 7 hours, I'm paying this person....?.. *$200*

.something's breaking down....

apportion the

INV: Well, if what .... I mean, what your trying to do is ~~a portion of~~ cost of the contact relative to

the agents cost. Well the agent has a cost that includes the salary and all the solutions. I

mean the salary basically includes the out of service costs. So by just saying you.... if it's just

X

~~xxx~~dollars per minute, that can represent... I mean that is good.

It depends *?.* on what you ~~do it.~~ *are doing*

Essentially, that's how much my time is worth and the fact that some of that time is not

does not

working time.....~~say~~.. effect that calculation.

non

Your not going to charge any one customer for ~~some~~...?... Is that what you were planning

to do, is allocate some ~~add some~~ additional kicker on that this is costing me for each

is

customer. Because you could take, say, it's ah... this person costing me a dollar a minute,

now I know that his occupancy is only 80%. So are you going to take that dollar a minute

and bump it to a $1.20, ~~al~~though [even] that's not quite accurate. And say that's my real cost from
   [^]

that agent because that's his productive time. I have to take his cost and move it into his

productive time. Is that what you were thinking of ~~eventually~~ [potentially] doing? Because there's no

way you could do that on a day to day basis to say, oh, you have 4 hours of training today,

so those [poor] suckers who called you during the other 4 hours and I think it doesn't matter,
        [^]

because you either use the dollar for everybody, or you use the $1.20 for everybody, I mean,

relatively speaking. So it doesn't matter if what your trying to do is understand how

profitable your customers are as long as what your doing is comparable for the agent.

And you probably did it, probably didn't ......?....

I don't think it matters, I think you decide your name is... you know the plumber charges you

whatever $35.00 an hour or whatever because your paying for that expertise and not...

DWS: And his travel time.

INV: Right....

DWS: He doesn't bill you for his travel time.

INV: That's right, ~~exclusively~~ [explicitly]. So what we're saying is we don't really need this out of service

time included in our overhead. We can still get a good calculation of my agent cost, my

variable cost ...?...my variable cost...........to me. Okay.

Yeah and you look at simplified. In fact, we had it simpler...[first]..?.... and then we get

Yeah, we didn't...... whatever this version was Randy that I pulled on March 17 doesn't have

that in here. I thought, what's he talking about. ..... I apparently didn't get the very latest

... but close to it.

-42-

Okay, so well, I mean, we had it simpler and now we added this in, I'm not sure I

think it was in a discussion I was handling it for out of the

Well, it was a good idea.

DWS: I mean he called it out. Because it is something that needs to be mentioned. So we do just

a simple call center and we'll plan on using that for all these and then we can do a couple of

quick flowcharts just on the module that tracks the information and updates the database,

then module decides calls.

INV: But we want to stick with calls opposed to contacts ..?...

DWS: No, it's got to be contact.

INV: Okay, so you can do cheaper media than calls.

DWS: Okay, I'm thinking of a multi-media call center where it ...?... Okay. Yeah, we went through

this on these little automated agent things we did, remember we went through and identified

and defined the contact center, I'll probably reuse a lot of that.

INV: That's good, that's fine.

DWS: For this one. So you've got your switch server.

INV: Yeah, so we draw on this .....?..... ....?....... outline ....?...... very well. .... should

be.......

Okay, so we're....

in the claiming mode.

DWS: Just a simple multi-media contact center.

INV: ...?.... contact center.....

Just draw like what with an agent ID or yeah....   It's a box................

-43-

Is a box okay....... multi-media .... boxes it's a solution ....

But we don't patent solutions, we patent boxes. Don't put it back, throw it away.

DWS: You shoot like a Nugget.

INV: So you have your....

...?... media coming in....

Well what we had is truly multiple boxes. We ..?.. show... like a black box.... you have

voice coming in

DWS: What if we do a PTSN and a data network...

INV: Yeah, we could do that.

DWS: Have it be more .....

INV: Something you may be already have a picture somewhat ...... PTSN ...?.... your going to

have your Internet or something to .....

DWS: Just call it data network, it could be a ....

INV: Yeah, data network. that you could bring in e-mail, bring in.....

.... customer out here.....

DWS: Yeah, we should do one off each cloud.

INV: Yeah, no doubt that work with the customer too.

DWS: This call with a communication device.

INV: And here.... it's coming in..... really at the Internet, right?

Yeah, but he wants you to call it a data network, so we can include in the

wham, wham, whatever.

Private public ......

-44-

So these are .... this is two kinds that are coming up to here, though, right.

Well, I mean....

And ...?...

In essence, it could be IP voice.

It could be voice, that's true.

It could be... ..?.. e-mail, it could be anything... fax...

So this could be .... another kind of device here....

Okay, then so inside the box, do you like to show anything in the box?

This is the contact...?.... ....

DWS: You should show a database, and we should show the module that's tracking and then we should show some kind of a work allocator or item.

INV: Yeah, kind of a...

DWS: Item and allocator.

INV: Router research....

DWS: and queues, we should show queues, item allocator, a tracking module...

INV: But you already what you want, so why don't you just draw it. You know this stuff.

DWS: ...... and you guys and correct me.

INV: You've got more ....?.... less than us.

DWS: So it's bigger, we'll call it ..?.. server..... really it's a multi-media server... We'll have some queues....

INV: Call it work queues and H... queues that your looking at.

DWS: I'm going to put the agents hanging off the other side.... these are work items, then your

going to have a.... What's a good name for something that allocates work items to agents?

INV: Work distributor ....

DWS: some kind of an agent.

INV: Work distribution or

Work distribution ....yeah, work distribution actually.

DWS: You could also call it resource manager I guess.

INV: Yeah, resource ....

And then that's going to talk or.... you need a box that's going to say here is where the

invention is, right. You have the database and then you have something that's talking to the

resource manager and talking to the database...... coming up the true value.

Actually, it's not just a single database either...

It doesn't matter, we can reference ...?....

DWS: Well, you'd have a customer profile.... means we are storing everything.

INV: Who do you say ......?....... What' not in our single database, for a logical data ....?....,

beautiful thing.

We have a link to anything else you want ...?... to find in a logical database.

DWS: So we'll call this then the.... this is the key, what are we going to call the guy that watches

the database... that collects the information, updates the client profiles or the customer

profiles and then feeds that information to the resource manager. ..?... this is the invention.

INV: Yep, the true value..... calculating engine... I don't know. possible...... true value sounds like

a hardware doesn't it.   value about .... like, no.... value, I know.

DWS: And I guess there's something here, there's really two ways to look at what you guys have

done over deciding the name. Your looking at, your offsetting revenue with cost, but you

could do this purely on a cost basis. Where if, I'm selling widgets and there all the same

price, and I'm more of a resource driven...~~?~~.....*contact center* **inaudible due to talking at**

same time...... , yeah, yeah, I may want to just purely focus on cost so when we do the claims,

I'm reluctant to put revenue in as an element in the broadest claim. So whatever we picture

should have something as far as cost in it, because when the Examiner sees that, typically

what they do when they get a case is they read ...?.. or read the summary, look at the claims

and look at the drawings. So to try to get him away from all that stuff that's out there, all

those multitude of patents we're talking about....

INV: How much revenue *a* .... company ...?... *coming in with*

DWS: I want to pick a word for this agent that has cost in it somehow.

INV: Cost or expense or either one.

DWS: We could say cost tracking agent..... cost..... or expenses is another one.

INV: I guess that... I'm thinking more.... tracking sounds more passive and not do anything....

....?... determination rather

DWS: Determining agent....

INV: Well I was thinking cost determination or something .... cost assessment... I don't know.

I sort of cruise back at that terminology a little bit. Well, at least the original idea was this

..?.. ~~focusing~~ *focused in* on profitability.... It is like, well, the cost for this guy could ...?... look great,

but you know..... ....?..... finally use...... *but* ~~always~~ look bad, but hey, ...,. *the money we* ~~re~~generated was even

better, so....

DWS: Well that's going to be the prime embodiment we talked about is what you described. But

when you do these claims, you think about what haven't people done before and that's the broadest claim. Nobody has ever taken costs and associated it in any way with allocating more ...?.... We've all done value of some type, but the same kind of value your doing, but no one to my knowledge has ever taken contact costs as a measure in determining who gives what work ...?.... and it's a common denominator in what your preferred embodiment is, so we ought to claim just the use of cost and work allocation period. Any kind of cost, it's just some cost associated with the contact. Have it be really general.

INV: But it is.... but, I think the other thing is true is that we're trying to associate possible particular customer.

DWS: That's why it's associated with the contact....

INV: Yeah, associated with the contact, but when you contact, it you could consider it one interaction, you know, especially when we're identifying the cost with the customer, finding the cost to a customer.

Yeah, ultimately, what we'll come up with here is, like you said, it's just a number that says, there's... this is where this customer falls in compared to everybody else.

DWS: That's a good way of saying it.

INV: So I say customer, yeah, I think you definitely have to have customer there.

...?... customer cost define it or something.

Something like that.

DWS: Because, your right, if your just looking at contact, well, everybody's going to have the same cost.

INV: Well depending on how long they take, but....

-48-

DWS: So there has to be historical ....?.... *element* in there, which implies or has to be a customer associated\
that's a good point. So....

INV: A customer ....?.... *cost* *assignment* that sounds .... to me.

DWS: A customer.... is well used....

INV: **....inaudible due to talking at same time....**

DWS: If it works, I'm not going to throw it away.

INV: Your suppose to put them in upside down so those ....?..... right. And what gravity, take\
these down. I don't know..... .....?....

I have no idea, if that's true that **.... inaudible due to talking at same time....** an invention\
where you don't have to keep them that way.

DWS: Customer cost....

INV: Cost assignment and.....

DWS: *Customer cost* Assigning agent.. Agent's a hot word.

INV: As long as you don't have to be one.

Actually, that's my idea of purgatory.

DWS: Okay, now we're going to have the resources and we should have ..?.. agents and I'm\
thinking what I'll do is just draw a human agents at a work station.

INV: And then you just have... you could split out self service voice and self service ...?.. or\
whatever you want to say...

DWS: Just call it self service voice. IVR.

INV: IVR is what it ...?...

IVR verses ....?.... web ...?...

-49-

It doesn't have to be web server where a product automatically ....

DWS: IVR...... give me some other ones to do that. So you have e-mail server....

INV: Auto respond. And then you have ..?.. base self server so you'd say.

DWS: You know what we could here is call it automated resource and then we'll bring that out. Yeah..... we're based....... so, we're doing.... oh we got to do a flowchart next. ..?... before we erase the board, let me get this down. I want to start.... Bill Walker, he's one of the engineers who helped me..... start bringing a digital camera, take a picture of the board....

INV: Actually, my brother invented some software which will read an image in like that, and clean it up, it'll straighten up your lines and align everything up and make your writing legible and stuff.

DWS: That's a great idea.

INV: And now they've got white boards that have little cameras mounted on them that take a picture before you leave.

DWS: Okay, so we're going to do........ Should I just call this a media server, rather than a switch server?

INV: ..... multi advantage .....?.....

DWS: So then we've got.....

INV: A longer switch......... ....

DWS: Multi-advantage......... here........... generic .....?...

INV: Oh yeah, she means Avaya call manager.....

No, communication manager

Communication manager....

Oh yeah....... ..?.. Avaya know a..... then the brief would be ACM...

No, but your not allowed to shorten Avaya, if it's a real Avaya ACM, you can't say ACM.

It's a new ....?... guidelines ....?............. I don't think I see the file......

So I didn't know it was official or .....?... everything in multi-advantage. I've never used it

in ....?........

I know, I will.

DWS: We work on .... show human agents at work stations. And then we're going to have

automated resource, these could be IVR, e-mail, automated response and web-based. Okay,

now lets do the flowchart. I'll be....?..... ...?... you guys can go ahead and tell me what the

....?....

INV: Well the flowchart is kind of a process that how this would work is what your saying:?

Starting with work coming......

DWS: So we're going to do two....

INV: ..?.. my history, does that happen before work comes in or....

Well, no, I mean you got to ......?....

Work comes in and you either have history or you don't.

Okay, so that's our first decision point.

DWS: So we're going to have 3 flowcharts, we're going to have the post, whatever that was,

assigning agent with .....call back. There's going to be two things, update and provide it. So

it's going to collect and update and provide. Those are the two flowcharts and then we're

going to have resource manager which is going to query, receive and select and I think the

first two are pretty straight forward. It's going to be on a per contact basis. so we'll start

INV: Which one are you doing the.....

DWS: This is the other collect and update.

INV: Oh, collect and update, okay.

DWS: So we assume that he already has a data repository .... profiles with this information has already been started. So he's going to work on a per contact basis, a call comes in, he's going to...., after the call is over, he is going to determine the length and ...?... *of the call*

INV: The first one the contact completes is what we were saying about... the starting point, is the contact complete.

DWS: So we should say.. contact completed.....

INV: Or interaction ...?.. contact completes....

DWS: No, yes. Alright.

INV: Alright, so update... see if you look at customer....... all the things that we said here to calculate, right, the amount of time... what you need to know is you need to know the amount of time the agent start *dealt* with that customer who the agent wants right, which we always .....?.....

DWS: Once you know the amount of time for contact, then what you need to know is how many minutes do we spend on this ....?... *contact* and what did he buy. And anything else flows down from the ..*accounting side*

INV: And ...?.. about zero...... *there are three* ...?.. street things... How much time...?... *who* spend the time...... *and did* would he buy anything, what was the outcome, the eventual order.

DWS: How about determine?

-52-

INV: What was the business result....

DWS: Determine results, servicing resource.... and contact duration....

INV: Well, actually I would say....

You'd say servicing.... *is that* ..?.. the cost......

No, that's the agent...

Oh, I would say .....

DWS: Agent type and identity per person.

INV: Instead of saying contact, *the* for the cost, for duration, I would say servicing duration

because you might, I would include the after call work or after ...?.. because ....

DWS: That's a good point. So servicing duration....

INV: Don't we have to identify also any costs, or may be that's in results.

I'm assuming ..... it was all just ...?.. my....... the result would be, yeah, I mean what you...

if he was selling something, it would include the product ID's and presumably you know how

much they cost and how much... you know what kind of revenue you would get from that and

you would also know.....

DWS: So product ID's

INV: ... with the cost.

DWS: I'm looking at the terminal result.....

INV: revenue *demand* yeah and cost. Yeah, ..?.. that.....   results...... and presume we'd know everything

that I assume that was on the board ..?. explanation, should have been ....?.. everything....

Yeah.... right. Just as I'm assuming that the servicing resource has information about, you

know, the employee, who it was, how much they make, their m...?... exactly all that stuff.

DWS: Okay, so we got all the information then we update client or customer profile....

INV: Yeah. And that's where we might wait this, right. That might be the part of that.... and wait

for the ...?.... to wait

DWS: Wait what?

INV: Wait... well most recent results higher than ...?... profile..... *customer I'm* calculating a new true value

for this customer. I'm determining those things, but then I'm calculating my true value

which might be ~~waited~~ *weighted*

DWS: It probably will be.

INV: Yeah, yeah.... ....we'll have to. So I don't know if we want t~~o~~ step before we update the *a* *of*

calculating the true value.... And then you update it.

.... the calculation

But you gather your input through the calculation.
calculation step
DWS: So where am I putting the ~~track ...?...~~

INV: ...?.. determine them ... the update customers and not through ~~wait~~ *weight* comes off of the

calculation.....

DWS: So I determine what?

INV: Calculate true value, or whatever true customer value. Just a little note .... I don't

know why you thought this was going to be so fast....

DWS: Yeah, well .... we are going to have another meeting....

INV: We keep inventing........

DWS: Yeah, that one that I did, that real thick one there, we just kept.... there were so many new

ideas coming out of the meeting and remember the ...?.... Well actually there were two

...?..... ideas just kept coming out during the meeting. Because when you get the group together, it doesn't happen that frequently, and everybody starts talking about it, hey what about this, what about this. So next contact. So now we got the database updated.

INV: Yeah, that's one chart.

DWS: So then the other one, I think this other one is going to be pretty easy to start... and this one is basically ....?.... lets do this from the standpoint via-side ...?.... so _of the assigner_

INV: So new work comes down ....

DWS: ~~Without~~ _Not_ even new work, it just goes in ~~here.~~ _Q_

INV: Well, the decision is there's work that needs a resource, right.

flow
...?.... No there's a resource that needs work, so that's when you select among the...

DWS: How about if you say, work ~~unavailable~~ _items in_... queue just came in, whatever,

INV: Work ~~on its~~ _items_ waiting ..... waiting... But the decision ~~query~~ _point_ is you have a resource that can service some kind of work and you want to take, which one do I pick, right. ..?.. start is a resource becomes available.

DWS: Resource ....

INV: ...?..... start or whatever.............. resource becomes available. Then the question you ask is, are the work items waited, right.

DWS: Yes, simple no. You could do the union job.... and for the next one I do what?

INV: Is ~~their~~ _they_ work waiting.

DWS: Work item, waiting. yes, no. Okay.

INV: We need to ask or include in that question if multiple work items are waiting, there's only one, I don't have anything else to....?...

You don't have any choice.

I mean, the next thing could be select and you know, if the selection is one, who cares, I mean, it's a ...?.....

DWS: May be that should be the next question, multiple work items.

INV: Why don't you just say select the one that's the highest value. Do you have to query the value for each work item and then select the one with the highest value?

Yeah, and it's an interesting thought. Actually, if your going to queue them, you might as well tag them with the value in the queue. But you don't have to do it every time you ......

You want to cover both ....

Yeah, your going to take the work item and your right, your going to ....

But that's not going to change well as sitting in queue, you might as well tag it as soon as it arrives.

DWS: That's a good point, which means we probably eliminated a flowchart. Well, ...?... put it in work item arrives...... we'll do that one..... multiple work items, select......

INV: .... what contacts .... highest true customer ....whatever........

DWS: True customer....

INV: You might not want to say highest, you might just want to say best because that is another place where you could have rules..... yes, you could. And what....do the highest job, you might or might not be would be considered best.

And you might have to... this is where you might have that other step somewhere that says, are we out of service ...?.... or that.... or we need our service ....

So that's where the ....?...... more appropriate, depending on your rules and the ...?..

might say it's not gong to be the highest ..?.. because this person is out of limits.

DWS: Yeah, ...?....

INV: ..?.. that's good.

DWS: Select a work item, I think we should do this because this is what the thing is based on, then

in the description, going to say it would be appreciated, other criteria could be considered in

and then list stuff

the work items such as ...?... longer ....-so, select it, then you go back....

INV: And then your assigned to the agent instead of resources, assigned to the resources. And

that's where this thing goes to. Yeah, it's ....

There going to give it to us.

DWS: Pretty scarey isn't it that you have to think in terms of ..?..... exposure.

INV: That's how I started out, only I think it was in the 70's.

DWS: A resource...

INV: It's generally ....definitely...................

DWS: Well there's that one..... so we should do one where they tag it with a queue ....

INV: When the *item* serve comes in, yeah.

DWS: That's the most efficient way to do it.........

Otherwise, they have to repeat it for every item (or a

INV: ...authorize.......

DWS: Because otherwise we'll have a weird situation where they have the query ....every contact

in the queue and keep doing it too. .... So start, you work item, no, yes. Retrieve,

true, customer value.... alright.

INV: Associated with the ......or mark, or I don't know to say there......

mark item

...?... work with the tag .... work item ..... It's essentially setting a property on

-57-

And your done.

DWS: ...?... start .... to work item............ and .... done. Let me write

all those down.

INV: Well, ...?... need legal.................

DWS: I wish I had my digital camera here, quick.... read your only writing now. I don't now.....

INV: I can read it pretty well..... it's not bad. We should.... are you thinking we're pretty done with

that one, once you write it, because we could kind of quickly review one of these.

DWS: Why don't you just pick one....

INV: .... go through that. Did you want to ...?...

It's one ....

Well, Rod did .... One .... originally .... and I was..........

Do one and

I think that's the ....

One is done..................

DWS: So we'll do another meeting, we'll have to try to.... what's the best way to set up another

meeting, because I'm just letting you guys now when I'm going to be here, then you can try

to fit me in ...?... stuff....

INV: Yeah, that's the best way to do it, because

DWS: Me e-mailing everybody.

INV: ...... calendar, that would be everything, I think, that's not on my calendar.

Yeah, it wasn't on mine either.

Yeah, so if you send us when your going to be here, we can just look in outlook and try to

find a time that we're all, or most of us can...

DWS: I was pulling my hair out, I don't have much to pull out, much left to pull out. .....?... resource and................. .... source.... Okay, here's another flowchart....

INV: So what it says is, the chart, is queue to call and now there's lots of agents, is not available, I've got to pick the best agent based on true value. That's true. ..?.. agent, here you can say agent available, you could be it in that one, yes. And if it's yes,

What are you doing, your expanding this..

Yeah, ..?... different scenario. Then you select, this scenario is when the resource becomes available .... and this one is when the resource arrives.

DWS: Agents available....

INV: Work out .... working out right.

DWS: No, is what?

INV: No is select is select the most appropriate queue or waiting parking place, right.

DWS: So then there is select, yes, select, most appropriate agent and in either case, I then go back to the top. I go back to the new work item. I wait for the new work item to come back, the next in work item. So now we're ready for one in ...?...

INV: A couple of ....

DWS: Okay.........

INV: I think it is. ...?... other one to ....?..... I didn't erase .... but this one moves that .... go to the .... good, basically, you work .... and

And then here what you have is sort of... if it were waited from previous ...., and how

-59-

Or ascii number

do you determine that relation .... ways, in some kind of a order number.../ trouble

~~ticket or whatever~~   *You could just say or*   *Something. Find me all the references that have this number.*

We're asking them.

Well, actually you think you have this....

Well, ...?.. continue

But in way, it goes out back......   well, okay.

Yeah, if its related. Alright so then you have some indication or I guess this could be

contact, I don't know how many, do we count it...

DWS: Is that a question, that's a question..... related to previous ..*contact?*

INV: Oh, I think you definitely count.

Yeah, I mean I think we said something in there about having to count, so you want to know

how many, so then you tag the yes part of this is here and the tag with number of contacts.

DWS: Tag what?

INV: *The* ...?... contact.... ~~in a~~ .... ~~contact~~

The word tag related to....   *sh ((*

To same.....   Then you probably qualify it based on some other things. In addition to, you

might need this as well, ~~you ...?....~~ contacts........ and then, but the thing... oh, okay, ..?...and

...?... but the key point there is like give a different service. If it's not one and done, then I

give it different service than someone who has the potential to be one and done.

And so if we even talk about a bunch of possibilities.....

And this isn't so much a question as it just determine a number .... determine a

number of contacts related to previous contacts. But then I would almost have a question

-60-

Flowchart

somewhere that says, if that's greater than ~~URL~~ [*zero*], go off and give ../.?... service. [*one and done*]

.... multiple .... but then going through this, I don't ....

It's not I want them done and ....

DWS: ~~In~~ [*Then*] the no and goes down to what?

INV: .*2*... i don't like the question up there, alright. ·~~?...54~~, I would be the question way down [*like what we did before.*]

under somewhere.

Well you have to retrieve the information, so retrieve the number of contacts this is related

to.

Yes, you have to retrieve that. So rather than retrieve the true value, I retrieve number of

· previous contacts.... related, or something like that.

DWS: ...?. previous contact. [*Number of*] [*s*] Shouldn't that be two queries though. Because you determine the

number of previous contacts and then you have to determine if their related.

INV: Well you have to ...... your looking for.

Well, we don't care about previous contacts, we only care about related ..*contacts*

Yeah, we only care about related..*contacts*.. So you take the customer.....................~~that's~~ [*# You take*]

~~retracting~~ [*tracking or*] trouble ticket number, or something and you just, you say, you know, find me all [*the*]

the records that have this trouble ticket..... [*number*] So once I've got that, alright, so I've got that

number to be 0 to whatever... and I can tag it, ... tag it and then I can ~~sole~~ [*still*] potentially qualify

what .... here's what you do.

Well qualification can take into account ~~that it's, but~~ [*this so*] then you decide are ~~your~~ agents and [*there ? so*]

~~yourself~~ you want to select the most appropriate one and you can base that on those. I mean,

you can, but it doesn't come out clear........ I would put a question of ....

flow

-61-

Like here.....

Yes, before agents available and just say, we just want them.... this ~~is~~ /is\ not one and done or

something, I don't know what to say, right. Or is this returning or whatever.   And if it's

yes, it just goes down to what we've got there, agents available, like the most appropriate and

no is one. Determine .... escalated .... something................. or determine appropriate

treatment or ......

Activate a   agent

~~That's a better~~ skill ~~than any~~ .... activate quality monitoring, start ~~serving or with~~ observing alert a

business manager or executive....

So it doesn't even have to even be related to only agents available. ..?.. start the quality

.monitoring

How many things ..?.. are not even ...../...........? A related to monitoring routine

.... ~~infe~~ction

~~Related to the routing...~~ we going to

And I mean you still ~~get~~ a route, but other things I ..?..~~you~~ can do as well and I could route

differently so I might ~~have~~ unique routing, I might have determine ~~on~~ and apply them or something to

the rate........... And I don't know Doug, how you get into it, it's not just determining the

agent it's determining ...?.. the ~~the agent~~.....

.... talked about........... start

You know, starting quality monitor, notifying someone special .... or

Notifying ....

.....?... in addition. And there's also, I mean another aspect of this is a way to do reporting

because I think, yes now, you didn't touch on that much, I was looking for that and I wanted

to talk about that a little bit to see if there was anything that was patentable in a claim around this. Because it would be a good test case for us to ever get a patent on ....[monitoring]........ I think it is, no,   data ....?....................

Okay, so, alright t[hen] Randy you thought there was something over here here, so....

Well there is going to be this, kind of a notion here of once the contact is complete...

Does the agent think its done, this .....?..... getting out. [Is that what you mp, at]

Well I need to update information about that customer, right, you still have to do that because you have to know that we had a contact, .?/. [there was this] issue so that, I mean.... How are you going to get this information if you haven't done something over here.

Well, I think what you do over there is, you have to use your, whatever it is your using to determine whether that it's related to something else.   So I'm presuming you already have that, you have to have something. But I don't know if we need to.... how we retrieve another previous contact... you know, if we have all these different ideas....

Yeah, when I even had one that said it's the same customer and it's within 48 hours duration or trouble ticket or whatever, but we flowchart all those, we just state... but your question really is, how did we determine that. Your just....., all your saying is retrieving it, like somehow we've assumed we've determined it. Well, it might be better to say determine it, this is a previous contact rather than retrieve. Or we .....?...

....?.... can determine that.....

It's a key, but it's not necessarily the invention.

No, I mean... because I think that'll be assuming those [that already exts], the use of that....

...that prior art exists, we don't use it.

-63-

I mean I think it's kind of like the true value thing, that information exists, we're just not collect... we're just not making use of it. Or in some cases, it may not exist and then your back to this, you know, either the same customer within a certain period of time, which I think is not a very good way to go about it...

Or asking the customer which isn't necessarily a good way either... to say, is this related to something previous.

Well, we do that too.

I know.

I mean, that's the only way......

And then the agent tags it. So that's why I was trying to get over here, so that the agent determines that it is in fact related to something, even though we didn't know over here... to make it go ahead and enter information ....

It does make sense what ...?... said to .... to reflect that or the agent would determine whether it's related to a prior contact.

That certainly could happen.

The agent could and then do something and then we'd have to trigger special treatment post-routing, but you could still turn on a recording device and things like that.

Oh, I see what you mean.

Yeah, I was thinking for next time. You know, by that time, I mean, your pretty much finished there, but if the person calls back again, then you can get them with the agent update.

...?... be sure they call with their trouble ticket each time ...?...

-64-

Yeah, you know, you never, not everyone will give you that information. [*new cuz they*]

DWS: So basically, the way this is set up is they get two free contacts. One f..?.. is 8 [*this the trouble ticket*], call the first time.. is created

INV: The first time is a 1, that's fine....

DWS: The second time they call up, there's really now way to determine ..?..that's not true.

INV: If you say, you know, ..?.. [*please enter yur*] claim number or your trouble ticket or

DWS: I guess what I'm saying is on that side, that Randy's talking about, you ~~mean~~ [*need*], really you should, you need to record the contact itself because if you just say determine whether it's related to a prior contact and then they get two free contacts. You need to keep a record of your contacts by customer.

[*now*] INV: We do that, so....

Well, what I'm saying is you have to make sure that you know, and I guess this is just an assumption your making that there's some kind of issue tracking mechanism that this company has.... and this person called in with an issue even though that the agent ~~does a~~ [*thinks he*] resolved it, it got.. you know, record it [*ed*] somewhere [*piece of*] and so there's some... so that their customer ..?.. information back, but the thing is, it is highly likely that the customer says okay, well my problem's solved, the guy says well, here's your tracking number and the guy says that...and they just ignore it, because ~~it's like.... why do I need to ..?..~~ [*why do I need that*] because it's working, then the next day, well it ain't working, so I call him up, say, yep, I don't have any tracking numbers, I forgot that, so get it [*he's*] to a routing agent, and the agent goes, well, is this...

Is this about x...., I mean search on the customers name and they say, is this about product xyz that you called and ordered yesterday, yes it is, alright, when they've got the information

-65-

And they've got the information. At that point, you could actually have the agent take some

proactive ...?...

Do some of these things, yeah.

..?.... ~~well~~ one and done.

Besides the fact that now we want to record it, okay, this one has ~~its~~ required contacts and

run a report on that...

Yeah, we do. Yeah, we do need that. But I think what we need, is just the determined results

..?.. to that..... So contact complete...

Assuming ..?.. .. here

And we need to, it's not really determined the results, but it's.... yeah, alright. so.... it's like

record the reason, issue, trouble, whatever.

It is sort of a determined result.... your right....

It's not ..?.. my financial results, it's more my .....

I mean it could be that the problem didn't even get resolved and it's just an open ticket now.

Right, you wouldn't even expect

That gets pretty *that* likely ... So we need to...

And that would be an interesting thing where you could record it there..

...there are the two basic things I think that are happening.... you get rid of this and then your

doing, yeah ~~your arguing and~~ *you are doing a* determination of the result and then your updating the profile.

Well, but is it the profile or are you just, well your updating your ...?...

Your updating the.. yeah, the, I don't now, the trouble ticket or the ...

..?.. kind of a customer history isn't ~~there~~ *it*

-66-

I wouldn't call it profile here....

Yeah, profile doesn't sound right....

DWS: Should we use history for the other one or is this profile okay.

INV: The other one that I think profile makes more sense, but for this one, this is more like

tracking....

Yes, now this is, when we're ready we can get into the better tracking cause it can fit right

into that box, or around that box. I mean you need to have the data...

DWS: So we're keeping determine result, where we're going with what ..?... said and

INV: And see, my other thought too what we could do, is you could, when the contact completes,

the agent could put in ~~the ..?..~~. or subsequent contact or something that, hey, we know it's

not going to be one and done, don't set off the alarm, you know, or the agent could record

yeah, ..?/. one and done here... That could be a separate kind of side issue of... you think your

one and done.

That's an interesting thought.

And then if I think I am and I get rewarded for that, but then I don't make it, that would be

kind of fun.

I like the idea saying that, no, it's really not one and done, because now all of sudden we can

generate a report right now, which is.... how many, what percentage of ..?.. do we have that

people contact us ..?.. that are open and their going to be getting back to us...

They know already. Or we have to get back to them either way, ..?.. contact.

I mean...

That is a good ..... So a little side, squirrelly language to be, expect.... something in that order

-67-

call back... No, it's not one and done, no, not done.

Well yeah, actually, it's just.....

It sounds like a double negative..   No, I'm not. Okay, so we should we talk about reporting.

I want to get....

DWS: Before we do that, there's one thing that I saw *in* this that we haven't really talked about.

It impacts those two flowcharts. What you have here is another consideration of one and

done is *when* ~~with~~ the contact had to be served by multiple servers even in a singular interaction,

so the recording that Randy talked about in this flowchart is not just a number of previous

contacts, it really should be a resource base, record a number of prior resource...

INV: That's true ..... *instead of* contact complete~~ly~~ *d*, we just change that to resource complete *d*,

Well, the thing is....alright, so for here, lets take this one first... I think your right, a number

of previous contacts and ...?.... I mean that essentially takes care of your transfers and stuff.

And I actually wondered about that in the true value thing, so what if I, what if every time

this person calls I have to have my supervisor on the line too. That would be *an* expensive

person to deal with.

Yes. You should include that in .... Surely, ... It seems to me like, if every time I've got

to escalate to a supervisor or send it to a supervisor ....

Or even if it's an expert, *a help* ~~health~~ line.

Yeah, and then I think the cost..... but anyway, then we get over here, I guess, the question

is when an agent finishes, do they have to transfer it, I mean, did they finish, really. It's

not.... *I am ~~as~~ going to record* ~~towards~~ the results right there and the agent is going to ~~say~~ *think* no, when ~~their~~ asked are

you done .... so you have transfer it, the answer here is no.

flow

-68-

And then, I'm still going to, aren't I still going to update my /.?... to her.... But then it's next

time ..?.. the right question and should it really be next agent or next resource.

Well, from whose perspective are we looking at this, because for the next resource goes

around the loop again, right.

Yes, I think it should say..... I have completed the answer would be no. So that doesn't work

very well. It's the resource complete.

Shouldn't it be... shouldn't contact on the top and bottom be changed to resource.

If what your doing is trying to show what the agent does with the contact, yes.

If the agent, on the customer side, it's ...?.... don't care about..... You don't care about it, but

it's still ..?..contact.... that's a whole lot better, I mean, from the company's point of view,

it's a whole lot better if we get it down in one contact, even though these three resources....

?... if we had to use three separate contacts.

...?.... ... per customer, there's a lot of customers who don't want to talk to the agents.

Thank you very much. It depends on the company's definition of one and done, would be

by contact or by agent. And I think that's kind of a point... So this is good other than may

be we need duplicates or my definition is by agent and then I change contact to agent or you

could say contact or agent, I don't know we want it... that...

Well, if the contact is completed, your going to quit no matter what. If you get down here,

you could ask before that... do I need another agent for that question, say no, then you go to

the next contact.

Well, yeah, I know. This is kind of weird, because this is from the agent's point of view and

like, if I finish with this contact, then I get another contact.

Which is still always be true, yeah.

But I don't think you can do this chart from both perspectives simultaneously.

..?...So where does this start on this, the agent is not available we're saying. Basically. No,
the agent has completed their portion of the contact. That's the start, agent.... may be we
need a box on top that says, well, it's kind of a question, do we need a question or just
saying, start with the agent completed their portion of a contact.

And I guess you could still say no and it just wraps around, I'm still talking. ..?.. kind of
funny..... but yes, then I go there and then instead of staying here, you want a..... they can say
what they did was contact /.?.. anywhere. We ...?..... say, you now, we hung up or anything.

Oh, well, if it's completed, you know, and we need to be clear on that completed ..?.. after
Caller two or ..../.. ·here........... and that's when I determined ..?.. the result
part of its after ..?..... isn't it. Yes.

Yes it is, so then here you want to say, well actually it would be here, that they would
transfer. I mean this is where determination ....?...

Is it hanging up or transfer... or whatever... but may be ....

..?.. do the transfer.

So this is, yeah, this is ....

..?..... ....

They both go the same way.... Actually, you could change place....

Say something more like issue solved and then no, what happened do I transfer it to
somebody else or do I record it and...?....

You could do that.... but in either case, I still have to find the same track for this agent.

Right, right. It's just a recording of what your [*you*] did.

So it's not like it's two different tracks. Are you following all this stuff.

DWS: The tape recorder is.

INV: It's really understanding that this and that pointing...

[*flow*] Well, not necessarily. Well you said that if the thing came in and I couldn't solve the

problem, I can't solve your problem, but I can transfer you to somebody who can. Well the

company policy may be that, you know, it's that last person that ~~we're actually setting up~~ [*wraps the thing up*] and

[*says what the*] ~~: or.~~ result, so this guy may be ~~sitting around~~ [*out of it*] the picture and since he didn't solve it, he

transferred it to somebody else.

You still have a result and the result was not solved, transferred to an expert.

Alright, that's true.

And I think that that's important to define ..?...

And they can decide whether they care or not.....

Put that in there......

No, I think that is important, because [*it is*] like sitting from a reporting point of view ...?.....

So this is like ~~where~~ determined disposition really would include,...~~the~~.. [*determine*] result would be

[*what was*] ~~one with~~ the deposition. My disposition. Yes, right... as opposed to......

That exists, I already got an arbitrary ...?..... agents..... disposition. .... Could be band...?...

yeah, it could be, I did what I could, but it's not done. ~~Expectical~~ [*Expect a call*] soon.

Well, [*that's*] ..?.. a lot, I mean you say, well or you might say, well I need this information in order

to help you, you'll have to go get it, I can't, you know, so you say, I did what I could.... we're

going to ...?/.. [*hear from*] them again.

-71-

DWS: So you had a statement about another flowchart....

INV: Well, no.... but I think, it was about tracking. We want to get into tracking, because of one

of the things on one and done has been.... one of the reasons I think people have not used it,

and some of the ways that we talked about instead of recording to blah, blah, blah... is

because we can't really track that today. Because when I finish, I may think I'm done, I may

predict I'm done, but I really don't know I'm done until they call in again. And so we don't

have measures on our report to say, oh, how many one and dones did you do today. Now we

could get some of that, by just saying the agent disposition, did you finish, and again it's a

prediction.

DWS: So even if the agent knows he's going to be judged based on that ..?/.., say, of course. I'm

going to call a smart agent, I'm just going to ....?... record. Everything I do is one and ..?..done

no...

INV: And that's why this is important because if they call back, and there's a way to link it to a

previous contact, we can re..?....? the previous agent... See, because today we get the new call

in, they may tag it, but ..?.. call him back again, but we don't really link or measure that

agent, against that because we don't have a way to do that.

DWS: Well, lets focus on the different ways that you... your talking about one is trouble ticket

number which you could.. they have now, you could use this in existing systems. Because

there's a way there to detract it...

INV: Detract that this is not... but it's not.... You know, and it could be a trouble ticket system in

particular. My track, how many times.. you know, may track by agent. It's not something

we do in a contact center, because there's no contact center customer that a vendor that I

-72-

know that has a measure for what percent of one and done for this agent. And the issue

primarily, the one we started with, I think was the poor guy on the help line who actually has

a longer average talk time than any of his peers, because he actually faces the problem.

Everybody else says, you know,

Create a ticket...

And he ....?.........7.... he doesn't get any credit, right, for being one and done. So this would be

a positive measure, in key performance measure for agents that we don't have today. Now

the way we propose solving that is, kind of what Sarah said, it's not that I know... it's really

the recording on the inverse of that, it's not how many one and dones you did, but it's how

many re.... whatever, recontacts that were attributed to you the non-one and done that are

associated.... but, that's going to be pretty tricky to tract. Well what we have to do then, is

when we go back and, I don't know, I was thinking of it on this chart, but I think that it might

could be on this issue tracking database, but when we say that determines special treatment,

we could add, you know, add the special tracking which says, look, we went retrieved my

previous contact, Gold ...?.... marks them with alright, second call, first call.... it goes back three, that first

person might get, and I don't know how you want to ding the first person, or ding the last

person I talk to...

Well, actually, you know what, if we have something that relates to, so you know a case

number, then you can see the whole history of the agent........ You can print that out from a

contact perspective, yes but not from an agent metric.

No, I understand that, I'm just saying but if the thing that ties it all together is the case, then

there's probably, you know, there should be a way to find the first agent. Yeah, if we

wanted, and again, you could choose how to track this. We'd probably want some choices

how to track / do we track this.

of to track again, the first stage is to retract against the last agent. If you had yet another non

one and done today, or

Actually, you might not even need to track it against the agent so much as, you know,

_a_

what...how are we doing overall, I mean people call back for variety of reasons.

Tracking

Well, and the thing we usually need that we get into the analytical stuff, so what kind of

things are not one and done, so what can we do to fix that... Is it an agent training problem

product that ends up always being

or is this really the training, is this a particular part and ...?... be not one and done is a

particular whatever. May be it's this customer, this particular customer is never one and

and

done, I don't care what we do.... so give up on it. At least we can start taking action, right

that / bout

now while it's important in people's house, we'd love to one and done, it's just random.

Basically, we can't, we have no control over one and done, because we can't measure it and

we don't do the things we talked about even with special action.

DWS: So you say a non-one and done situation can be derived, so what your really doing is your

else was

focusing on what was not one and done and assuming everything at that ...?... not one and

done was a one and done. So your kind of

INV: Like, what percentage of work did we get today.

DWS: Your establishing a positive by tracking the negative.

INV: You know, because we can't really have ....?....

right, the agent says

Because your ...?... say, yeah, that was one and done, but no, it really wasn't, and you don't

find out until 2 or 3 days later when the customer is calling back.

there will

And even so, they'll have to be a time limit. I mean it has to be one and done within some

-74-

time frequency, I don't... you know, might call back, ...?... so for heaven sake, ~~he's giving~~ *it's a*

new

~~me a~~ call.....

DWS: ...?... say *You a* non-one and done situation can be derived based on duration ~~that's been incurred~~ *between current and*

~~on~~ *last* contact, is this what your saying.

INV: No, that is the poor man's way of deriving it... What I'm saying is even if, supposing I had

a trouble ticket that I called in in May and then, you know, because the system as far as I'm

concerned is one and done until I call again. Well what if I don't call until December. If I'm

Tracking calling in December about a trouble ticket I did in May, that shouldn't ding anybody as far

as I'm concerned, because obviously it wasn't really an issue.

Only if your not calling Avaya... It could take that long to fix the problem.... Well

You might
presuming we got calls in the meantime. .....?.... ~~must~~ have been given a promise, right. 6

months, ...?..... Oh, I see what your mean. Alright, they can do ....?........... you decide,

call
if it happens within a year or is it the same ...?...... ~~format~~, then we don't recommend doing

that, but for tracking, we don't want to rely on that anyway.

Drop
DWS: So you would set that up in your database policies? ...?... records after a certain period of

time, and then a period of time, you just

INV: All I'm saying is for today, what percentage of the calls came in that were like repeats...that

not new
were ...?... opportunities for us because for today and we can now manage and look at that in

the
realtime. For some reason, we're up to 50% and it doesn't matter whether ~~there~~ first call was

a week ago, or 6 months ago, we're wasting all this time resolving the same bloody

problems. Lets go do ~~some ...?... lets go do~~ something else.

DWS: You would still, at some point, you would have a stale built into a words to stale to track and

INV: I'm just thinking during the ...?... all your going to say is this percentage of the things

we got in today were repeats. But that doesn't tell you of the ones that you considered, that

were not repeats, how many years..... how many become ...?.... you don't know.

But you just have that way... after they... in the future and what ...?...

But that's an analytical thing, because your going to see all the time.

That's right. And you would probably want a report on it.

Your going this way, that's bad... Your going this way, it's good.

And the more often it repeats, so how many are third repeats, how many are fourth repeats,

it's like I am just killing myself in not solving these problems the first time.

DWS: So there's really kind of two inventions here, one is the tracking piece, then the other one is

this concept of special treatment.

INV: And the routing, yeah. Routing the treatments.

Part of the special treatment, yeah.

DWS: Because nobody ever tracked this.

INV: No, and see that's what I thought, that was kind of a hot issue, but ...?... didn't recapture it.

And I think that clearly the other issues is hot too. But I, and I don't know if we can kind of

capture both of those or want to separate those.

DWS: You know, I think these two flowcharts are pretty much laid out. I wanted to focus on this,

the different ways you could determine whether something was not one and done. One of

the ways is where your looking at the agent to provide in part, you have a trouble ticket ..?..

there's, even though this is a ..?.. way of dong it, people aren't doing it, where they look at

the duration between the current and the last contact, defined by the contact center. Contact

Center customers ...?.... ..?.. we talked about that ..?.. ~~as specified in~~ the most contact in
[handwritten: entering a trouble ticket] *[handwritten: of specifying]*

regards to previous ...?... you could have the purpose of the call, in which case, somebody

would have to record that. The agent presumably would record ..~~that~~ *[handwritten: that]*

INV: ..?.. ~~IDI~~.......... that's real typical, the ~~IDI~~ says, this is a previous thing and you say yeah, and
[handwritten: The IVR] *[handwritten: IVR]*

right away it's like okay, we've got information now.

And then say...~~/~~ trouble ticket number..... and you could get ...?....
[handwritten: they would give me a]

DWS: Well the next thing about an IVR is it's foolproof, your not going to have an agent that's

going ..?...

INV: going there... meet ....

Yeah, that's true too.

You could actually, really have agents to get together and say, listen, we close it out, and we

close the...

We just always.... and we take a new trouble ticket every time.

I've been on the other side of that, there's a customer going no, this is the same problem...

they go, well, we don't have that, we're going to create a new one for you here. But ....

[handwritten left margin: Tracking] Well, I was thinking like Blue Cross/Blue Shield, you know, if you called about a certain

invoice or something, you know or a claim, they have that claim number and they can see all

the stuff you said previously. I have lots of experience with this. That's just me again. And
[handwritten: that]

Yes, it's the same claim, the same dam claim and they blew it again.

DWS: Did you say content analysis in here. That would presumably be a text based....

INV: Yeah, like e-mail.

Could be, but it could be IVR based again, ~~future~~ recognition, true.
[handwritten: voice]

DWS: So what would be looking for in content.

INV: Well you could say, like you know, what is your problem, please state the problem when

calling in for service, please state your problem. And you could even say, well I've been

calling about this for a number of times now and it is related to the product I bought on

Tuesday, and I couldn't do any of that, but say, okay, calling again.... see that word, again,

so they do single word or they could do .... just look, I mean, they could look for certain

things, I mean if you say, it's in relation to product x, you can just go and see ... history do

they have, anything recent that was on that..

See, that's what I think too. ~~It's like ...?..~~ product x or even an IVR, it could just say which

product is this related to, I see product x, I see this customer ID, go look up, oh, there's

already purchased, oh they've already called in a problem on this, that's not one and done.

I mean you could make that assumption, yeah.

DWS: And you see post contact server results from previous contacts, this would be the customer

providing my e-mail or mail whatever, just a survey, were you satisfied with your service,

were there any residual issues, what were they.

INV: Or you could you say, did you feel like it was completed? Did you get.... was anything left

unresolved or expecting ~~other~~ contact.

Yep, one and done. Nope, ... Yep.....

..?... thought it was.

DWS: With respect to the hardware, I think the same hardware diagram works as we used on the

other one.

INV: Lets see you have the name for that ..?.... probably

-78-

DWS: Your still going to have the resource manager, it's going to be in a media server.

INV: I would kind of like to see something hung off the hardware around the recording, so if one

of the ..?.. [*special*] treatments I can do is record this because it clearly is a problem. According to the

[*that would be an*]

DWS: They be ..?.. automated resource, it could just be one of the resources as a recorder. So you [*could*]

can have... you could attach, while another resource is doing the servicing, you attach yet

another resource and the call would simply record what's happening.

INV: ..?.. manager.... then what do we call them, the one and doner? What are we actually doing?

[*we're*]

Both are determining the treatment, doing things like, you know, starting that recording

[*like initiating*]

were.. doing special tracking, ..?.. initiate special....

[*agent*]

One and done.... you

DWS: You can see a repeat contact tracking agent or determining agent, is really what your looking

[*repeat*]

at, is a re..?.. contact ...?...

[*Name agent*]

INV: Yeah, we are, yeah, that's good.

DWS: And I think we need to have that second flowchart too. Yeah, because that's where you...

a situation where you have a lot of work items in queue, this one is where you have a lot of

available agents and this one is where you have not many, you have no available agents and

your in queuing things.

[*go back*]

INV: Yeah, but your not going to make a decision, other than you might ....?... to work...

DWS: Sure you are, you may want to

INV: based on

DWS: You may have special agents that are trying to deal with problem customers....

-79-

INV: Problem customers, that's true. Well, and that's kind of how, I mean, pointless to

appropriate queue.

DWS: You may have a special queue that's handled by swat team members, ~~and they owe~~ *that deal with* these bad

customers...

INV: If you didn't know... when it says......

...?... time ..... customers.......

And part of it could be too, that some agents just aren't ..?.. *good at* it exactly. You might assume

that these customers are my luck, happy customers and might want some agent you pick *might* not

to do the non-one and done/s, because their not very good at that. You don't want it brand

new, it's put it that way. You don't want a novice, you want a non-one and done....

DWS: Give them Arnold Swartznegger. What's your problem, okay, I'll take care of them.

INV: ...?... work *what* . *item* what do we say.... like an appropriate, yeah, but... have to know what ~~the~~ *is*

appropriate ..?.. *for this* agent.... Well the agent's not available......

Well, yeah, they got skills, but you could have a question up there, skill at one and done, yes

or no or whatever... and my skills with repeat customers, if the answer's no, it's like select

a first time... first issue.... and ~~with~~ *if it's* yes, and then define it to the ...?....

I don't know, I'll have to think about this a little. This one has a ..?.. , it *seems like it* looks a little

different ...?.. on this flowchart, different.

I just think once you've chosen the queue which with ..?.. *that* agents/are good at handling that.

That's what ...?.....

With queue, it's two different places and then these agents over here, I wouldn't have that

queue, ..?.. feel that way.

-80-

Anybody that's going to handle these guys here, it's only certain ones that are going to handle the non-one and done's.

DWS: So you wouldn't have the middle flowchart?

INV: I don't think so.

Well, may be not true though, right, because what if there aren't anyone, special ones available, what are you going to do, make them wait, wait, wait, wait.

Well you have

..?.. got all kinds of things you could be auto reserves, which refer to ..?... in a patent, but it's all one.... but it's all based off of what you did over here. Now you could put where it says, select the most appropriate queue, and then you said put in appropriate priority. Yeah, give

appropriate

it ..?!. priority, whether it's in the queue or whatever else is...?.... Yeah, we could do the service... My service level could be level....

HW Yeah, yeah, we could do that.

Goals, I guess you could call the service goals....

So, you would have this flowchart. *It is*

we're fine without it;

I think we've finally got it with, and not just art, the current art is to select, on selecting working ...?.... yeah..... Now this is the one, of course, that Terry acted most interested in, but she never did get any feedback ..?.. on the last one..... what's happening.

No, but you know, we've got a few more ideas, if we could get through it enough, we could say, Well, it's not *all* clearly, agent optimization or whatever the heck we're calling it these days, is her third leg iron stool..... and she, although, her ..?.. right now is on the

S

merge, and then next, is getting analytical store once again with the merge product, but after

her previous

that, it just stays optimization.... third parity. So I think she appreciates that we've got some

^

ideas, but I still think there's some ....

Yeah, I do too. It helps tie up things ...?... with .... partners are, so.... whoa, whoa two down.

DWS: Let me get my calendar out and tell you when I'm going to be back. So that you guys can ....

INV: Are you local, I don't know. I thought you were.

DWS: My office is 15 minutes away. So.... you guys should schedule a field trip and come and see me.

INV: Hey, that's a good idea. ..... are you downtown? I figured you might be. So when in ..?..., you have a ..?.....

DWS: So when in town... You have a....

INV: Downtown.....

DWS: Okay, so what we're talking about is using the agent ..?.. for protective agent assignments.

J:\4366\-145\Inventor's Interview.wpd

START

Resource or
completed or Contact ? N   could be
their portion   transferred
            Completed?
                    Transfer

Determine — are we
Result   done or
          not) includes
          agent's disposition
          of the contact
Update Customer   (done, xfer, etc.)
Issue Tracking
       DB
Y   Next
    Contact   N

START

Resource
Becomes Available?   N
Y
Work Item(s)
Waiting   N
Y
Multiple Work   N
Items?
Y
Select Work Item
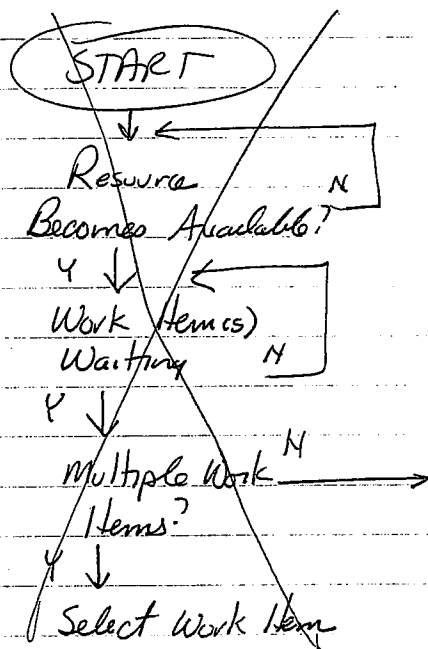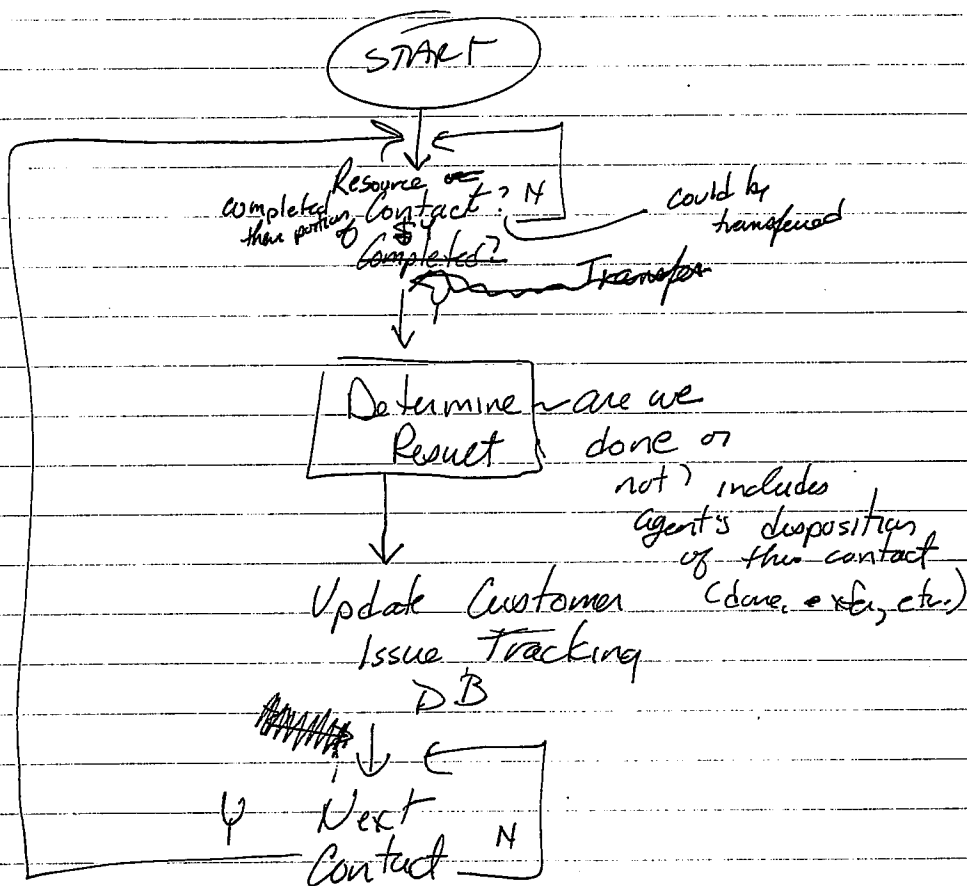
```
                    ( START )
                        │
                    ─→  ↓  ←─────────┐
                                     │
                    New Work  N ─────┘
                    Item?
                        │        Determine # of col
                        ↓        Determine # of contacts    Retrieve
                    Retrieve + Related to    #              # of
                    Previous Contact #                      previous
                                    Customer                contacts
                                                            & resources
                    ≠#
                        ↓
                          contact
                    Tag ┴ with
                    Number of
                    Previous contacts
                    related to same
                    issue
                        │
                        ↓

                    Qualify contact
                    based on true customer
                    value / # contacts,
                    language, channel/media
                        │
                        ↓

           N        Is this a new
        ┌───────    issue?
        ↓            Y
    Determine &      ↓
    apply special   Agents Available?   N ──┐
    treatment        Y                       │
       ↑  │          ↓                        ↓
       │  ↓                              Select most
      ↗   ↓         Select Most          appropriate agent
    (add special    Appropriate          or place to
     tracking )     Agent                park call
                        │                    set priority
                        │                    in Q
                        ↓  ←─────────────────┘
```

4366-145

historical
over time

show
manager agent
at work/status

Comm Device — PSTN — Media Server

Resource Mgr

Comm Device — Data Network — web, email, instant messaging voice

Customer Cost Assigning Agent

DB

customer profile

automated Resource
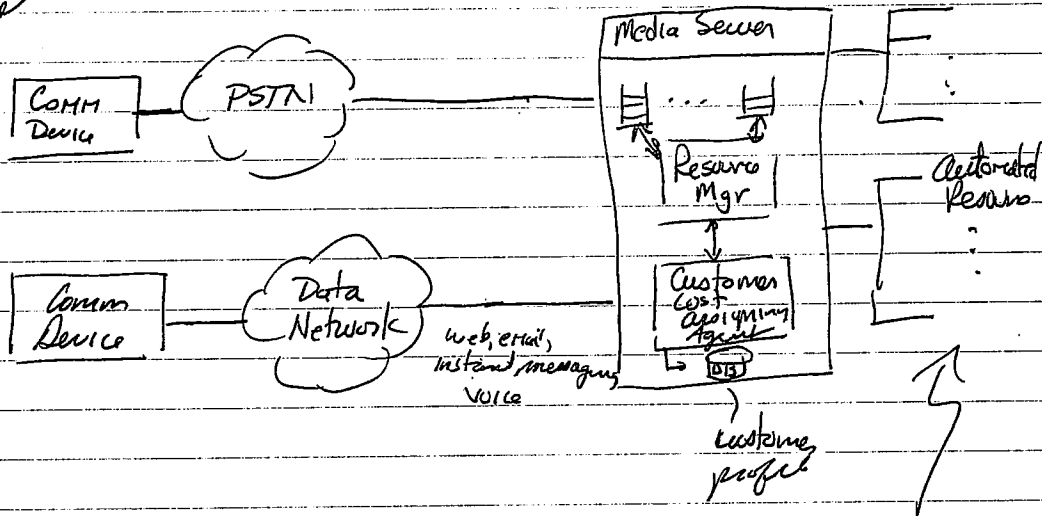
IVR,
Email
automated
response,
web-based
self-service

START

Y / Contact Completed? \ N

sold product ids,
revenues,
cost of sold item

type of resource, resource identity

Determine Result, Servicing Resource, and Servicing Duration

weighting

Calculate true cost value

Update Customer Profile

Y / Next Contact? \ N

START

Resource N
Becomes
Available?

Y

Work Item(s) N
Waiting?

Y

Multiple N → Assign
Work Items   to
               Resource
Y

Select work
item with best
true customer
value

START

invoke
only
when

New Work N
Item?

Y

Retrieve true
customer value

true
Assign customer value → queue
to work item   arrives
                   to work
                   item

B   Enqueue Enqueue
        A   Assign to

(B) (A)

qualify contact
based on ~~reason for~~ true customer
value, ~~kind of~~ contacting, channel/media,
language, etc.

~~Enqueue Park Contact~~

Agents
Available?

Y   N

Select most
appropriate
agent

Select approp
Queue or
parking place

Flow chart

START

Select
Agent

Retrieve Historical and
Data for Agent

Select Criteria
to perform
trend/pattern
analysis

Analyze for
Pattern

Update Trend Agent
Data Template

Y   Next
Agent?

N
STOP

What
happens in
Identify patterns
box

Includes
'trends'
↳
Agent Templat
Trend Data

```
┌──────────┐
│ Collect  │
│ Metrics  │
└──────────┘
     │
     ▼
┌──────────┐
│ Identify │
│ Patterns │
└──────────┘
     │
     ▼
┌────────────────────────┐
│ Feed into              │
│ workforce management   │
│ application            │
└────────────────────────┘
     │
     ▼
┌────────────────────────┐
│ Agent  Scheduling      │
└────────────────────────┘
```